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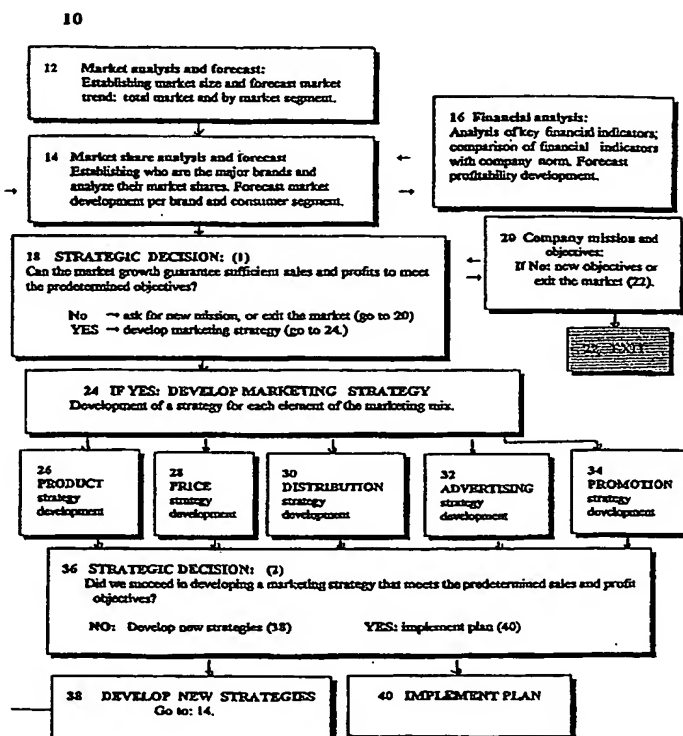
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For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

(54) Title: METHOD AND APPARATUS FOR INTERACTIVELY PREPARING MARKETING PLANS



(57) Abstract: A method is disclosed for devising on a computer a marketing plan for a particular product/service provided by a given entity. The method comprises the steps of defining one or more variables that are used to carry out the method, creating a series of charts for implementing a processing of analyzing the defined variables, and defining a product name, a time frame over which a process of analysis is carried out; and a geographic unit in which the product is marketed. The process of analysis (14) includes the steps of analyzing the size of the market for the particular product and forecasting the size of the market within the frame, identifying the major brands of the particular product within a given geographic unit and calculating the entire market for the particular product within the given geographic unit, determining the share of the entire market of the particular product marketed by the entity, setting goals as to the profit level of the particular product of the entity and monitoring the current profit level of the particular product with the profit level goals (28).

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US00/24780

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/60

US CL : 705/1

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. CL : 705/1, 10

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
Derwent, EPO, JPIO

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A, P	US 5,999,908 A (ABELOW, DANIEL) 07 December 1999 (07.12.1999), Column 9, line 15 - Column 14, line 59.	1-5
A, P	US 6,009,407 A (GARG, AMIT) 28 December 1999 (28.12.1999), Column 2, line 38 - Column 4, line 29.	1-5
A	US 6,044,357 A (GARG, AMIT) 28 March 2000 (28.03.2000), Column 3, line 1 - Column 4, line 23.	1-5

☐ Further documents are listed in the continuation of Box C.

☐ See patent family annex.

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document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

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document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

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document member of the same patent family

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18 October 2000 (18.10.2000)

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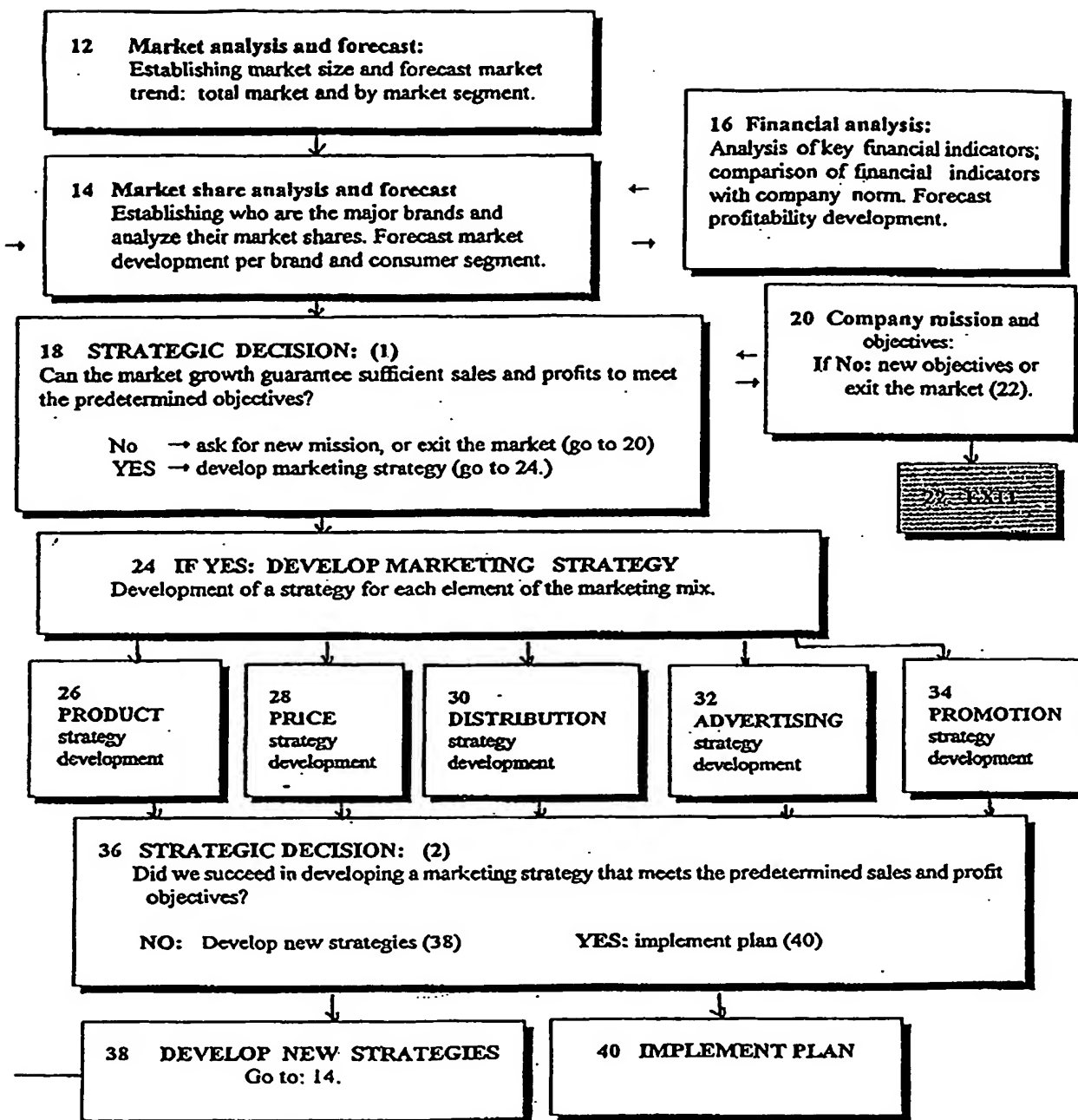


Fig. 1

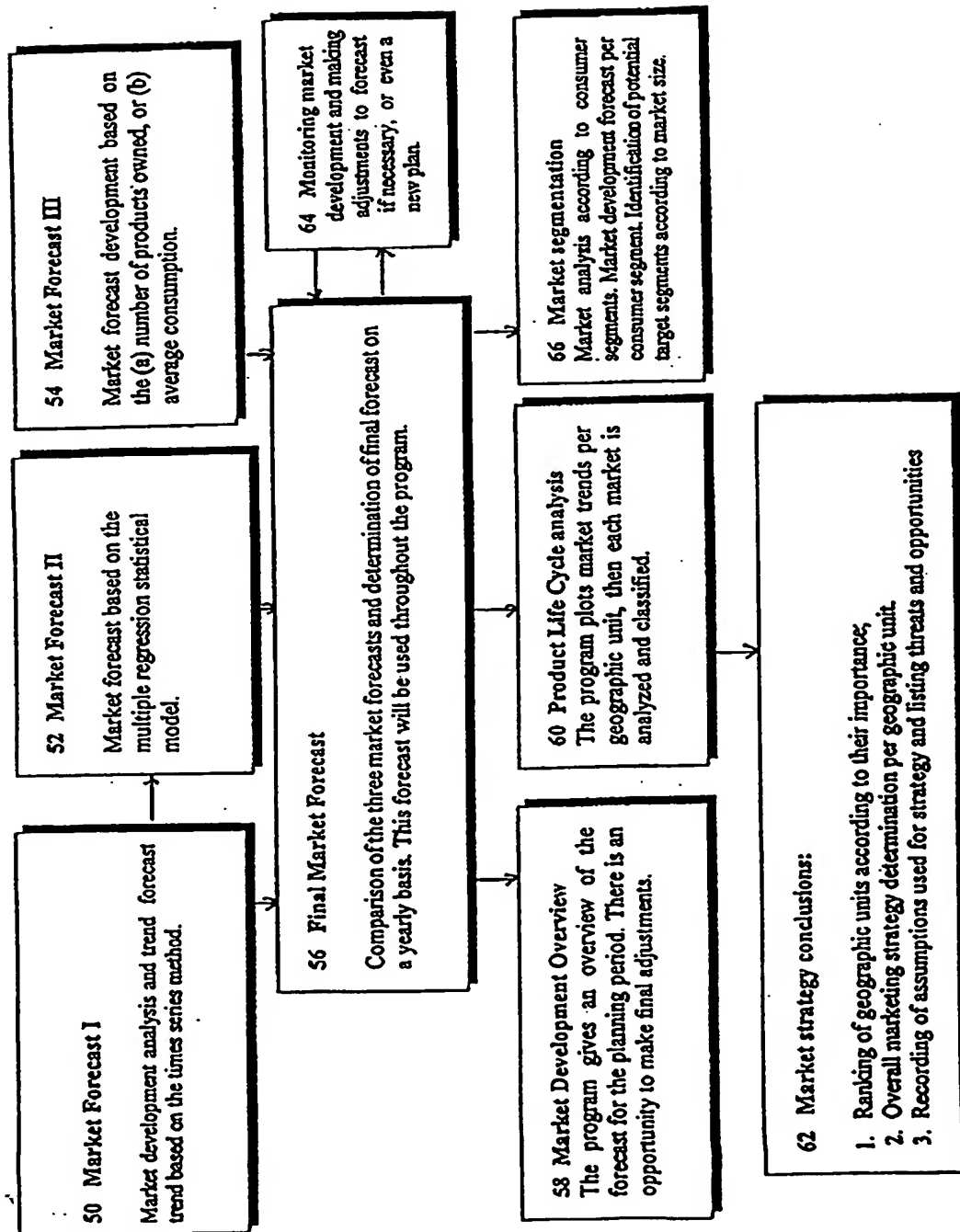


Fig. 2.

14

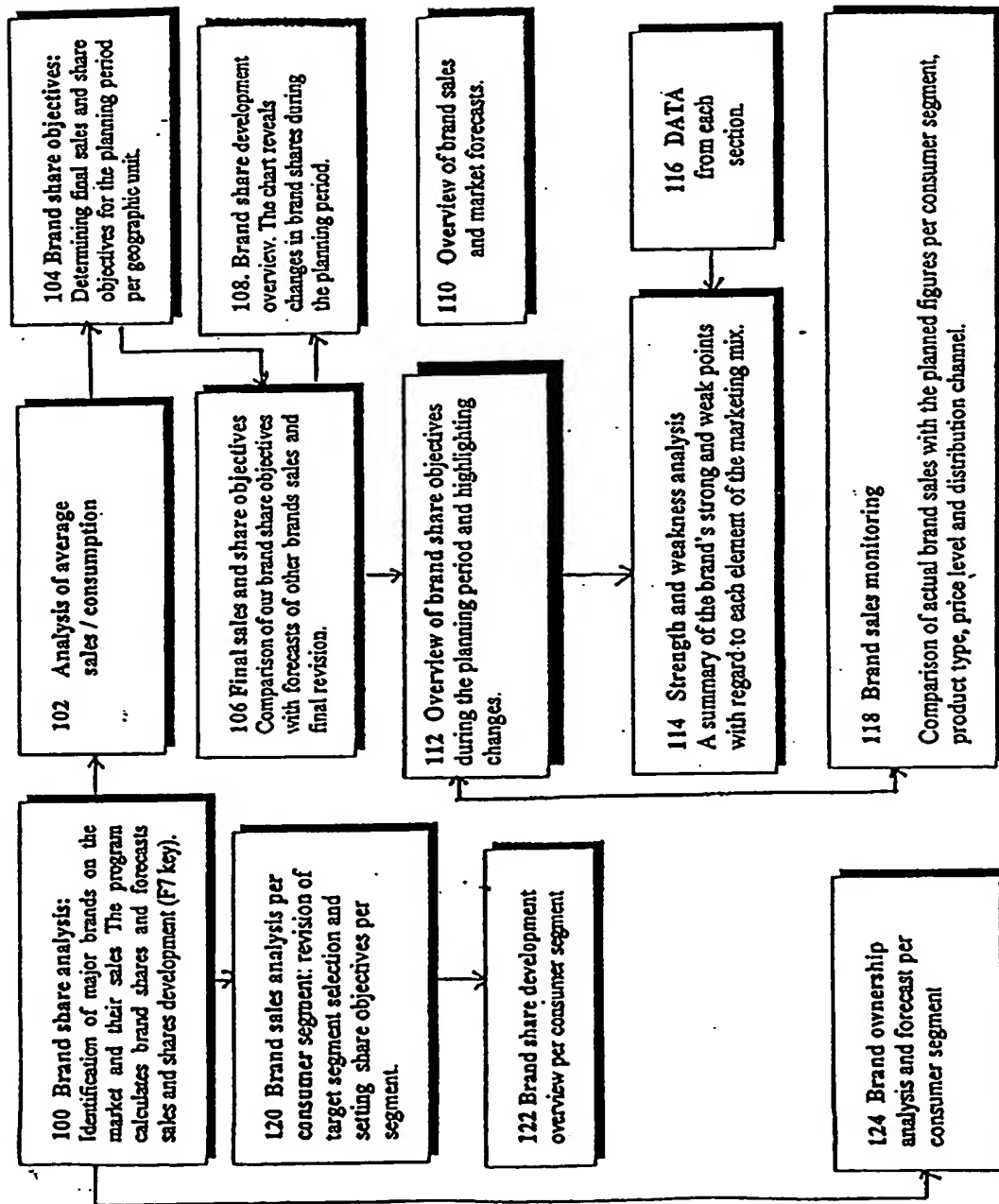


Fig. 3.

16

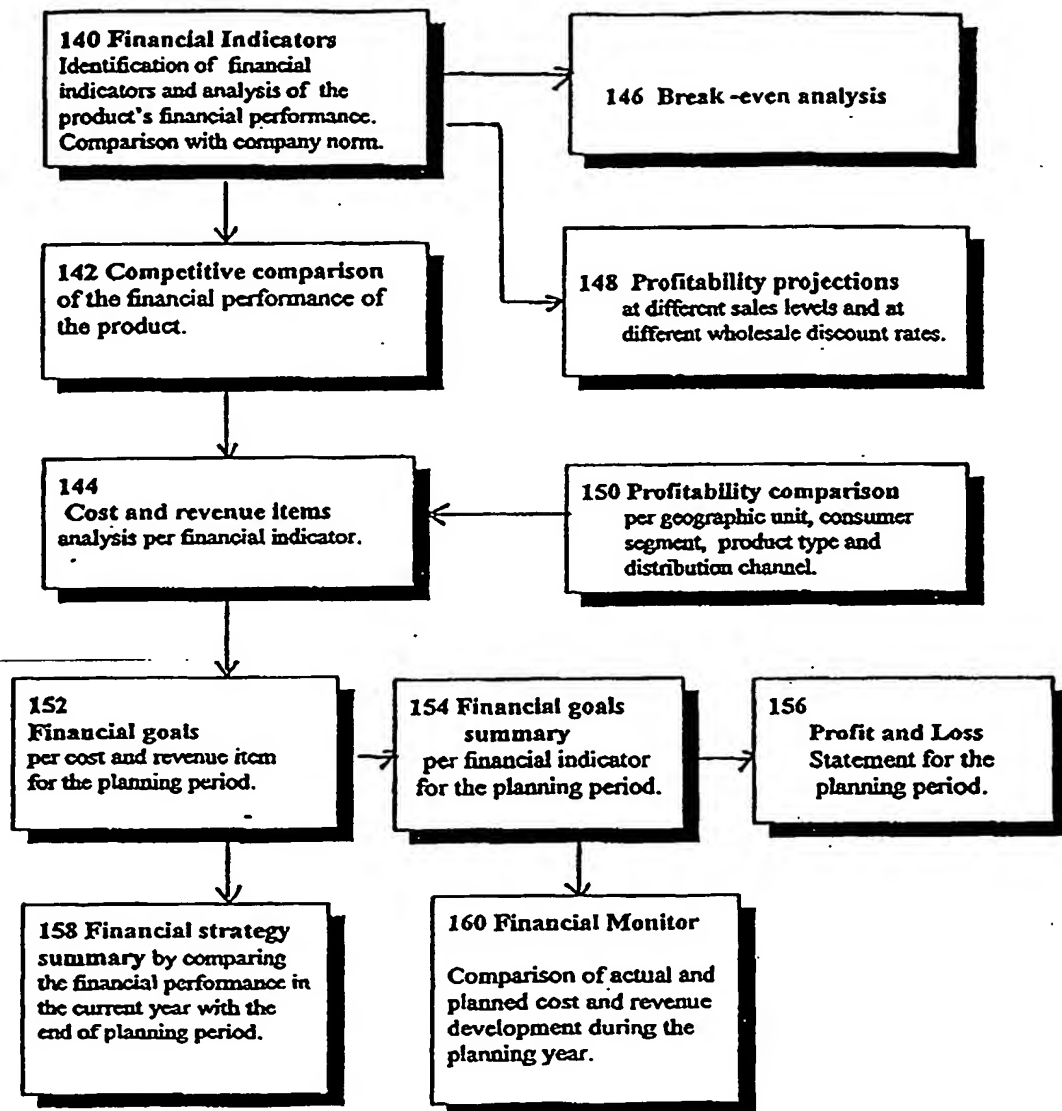


Fig. 4

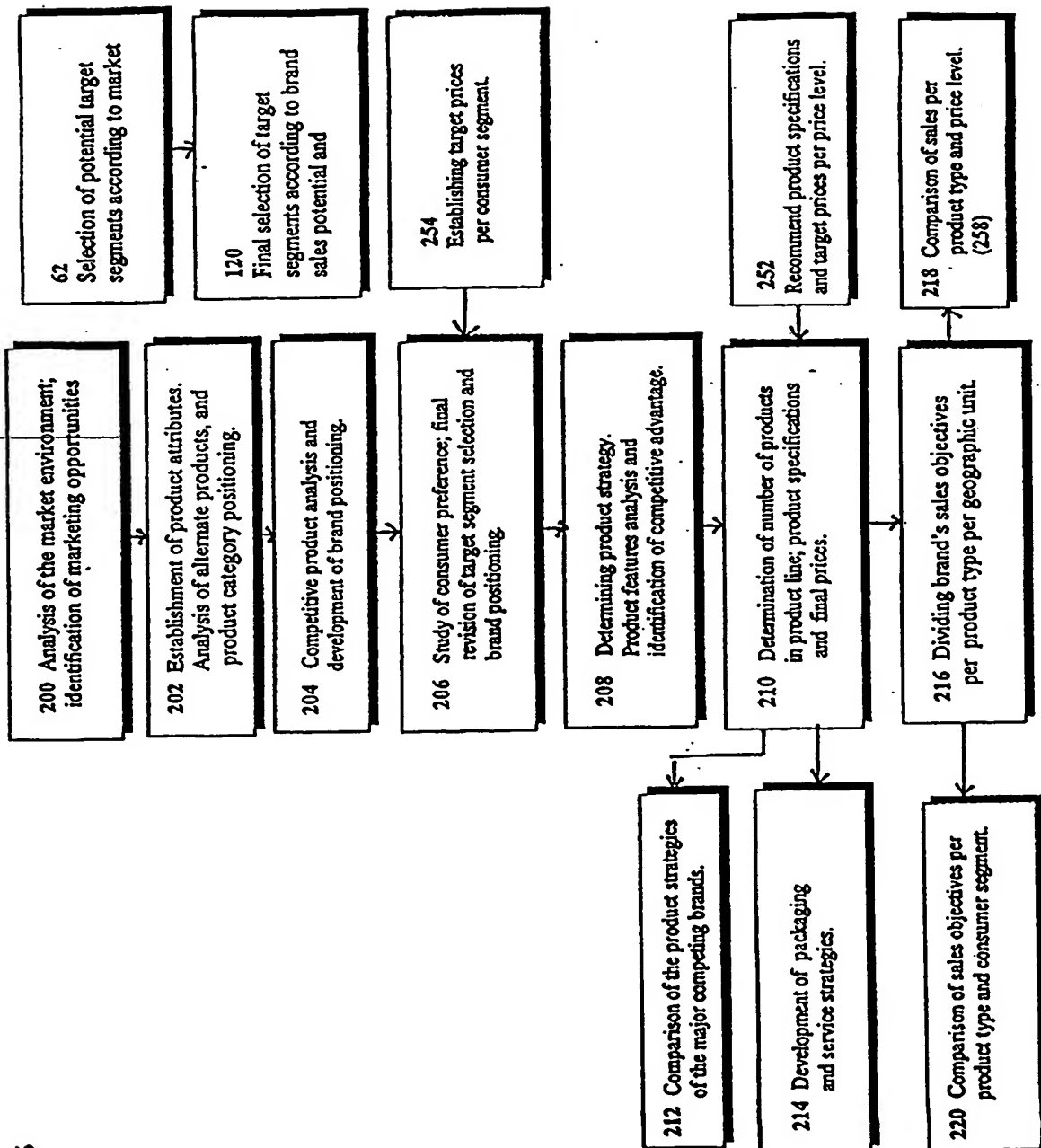


Fig. 5

26B

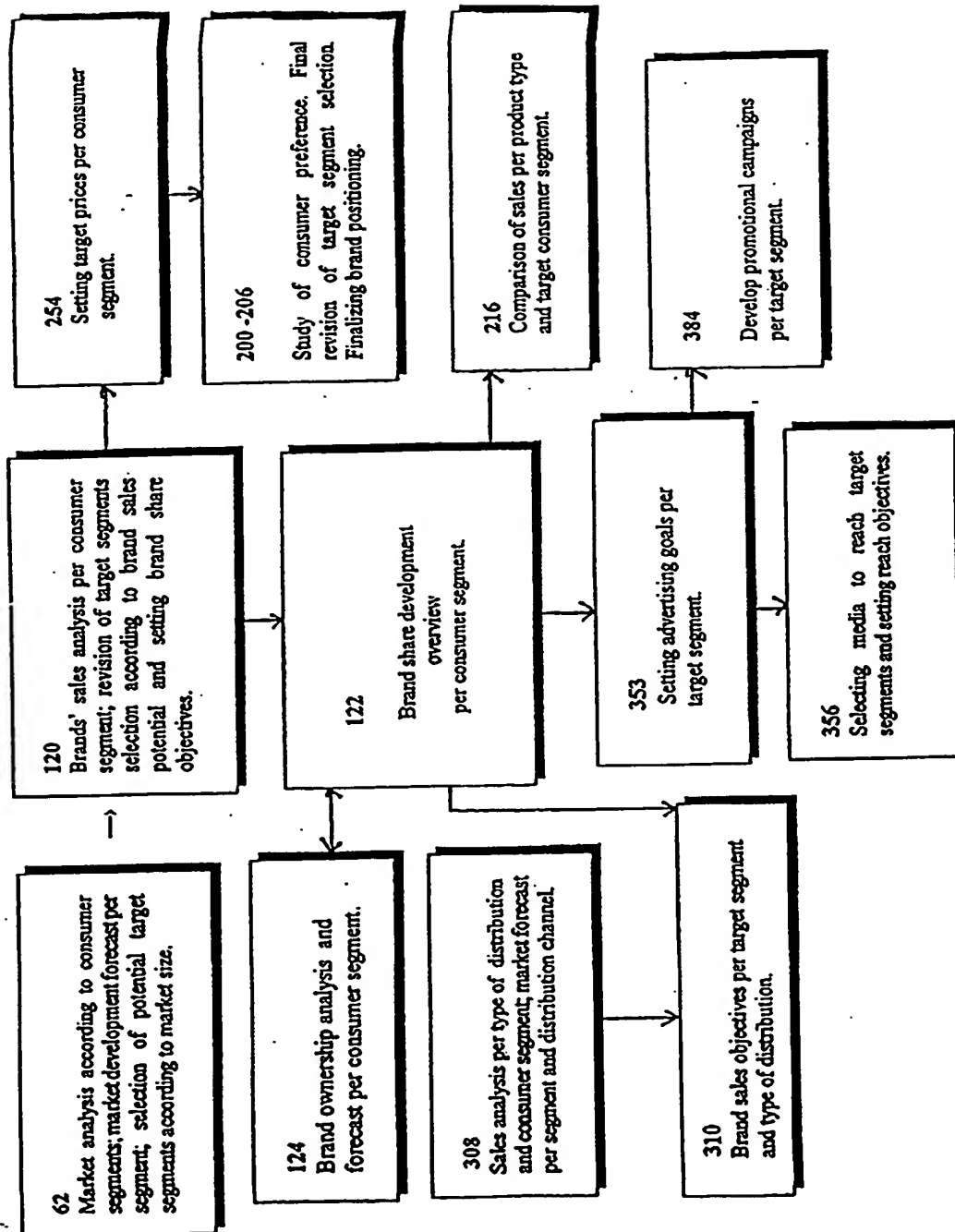


Fig. 6

28

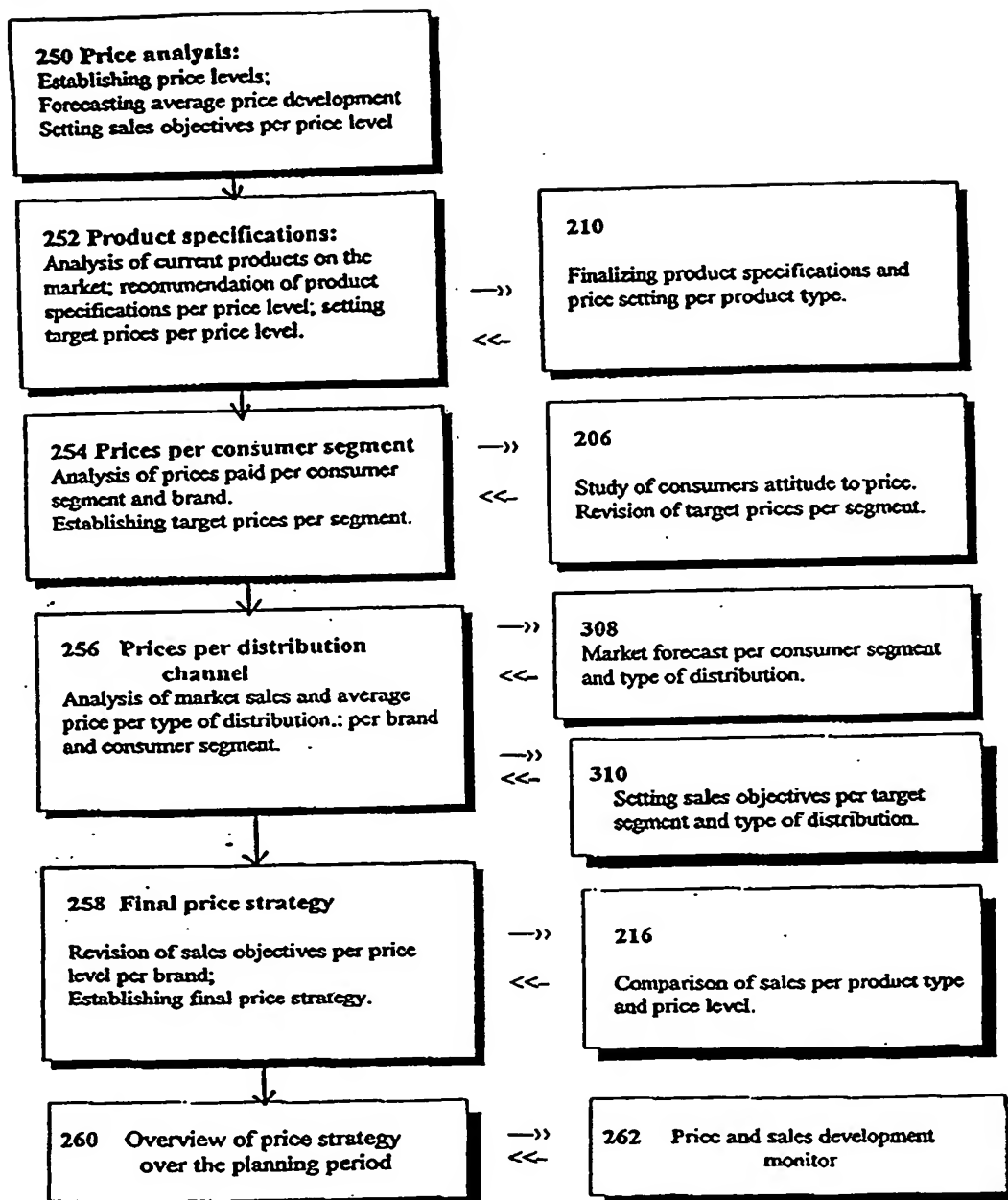


Fig. 7

30

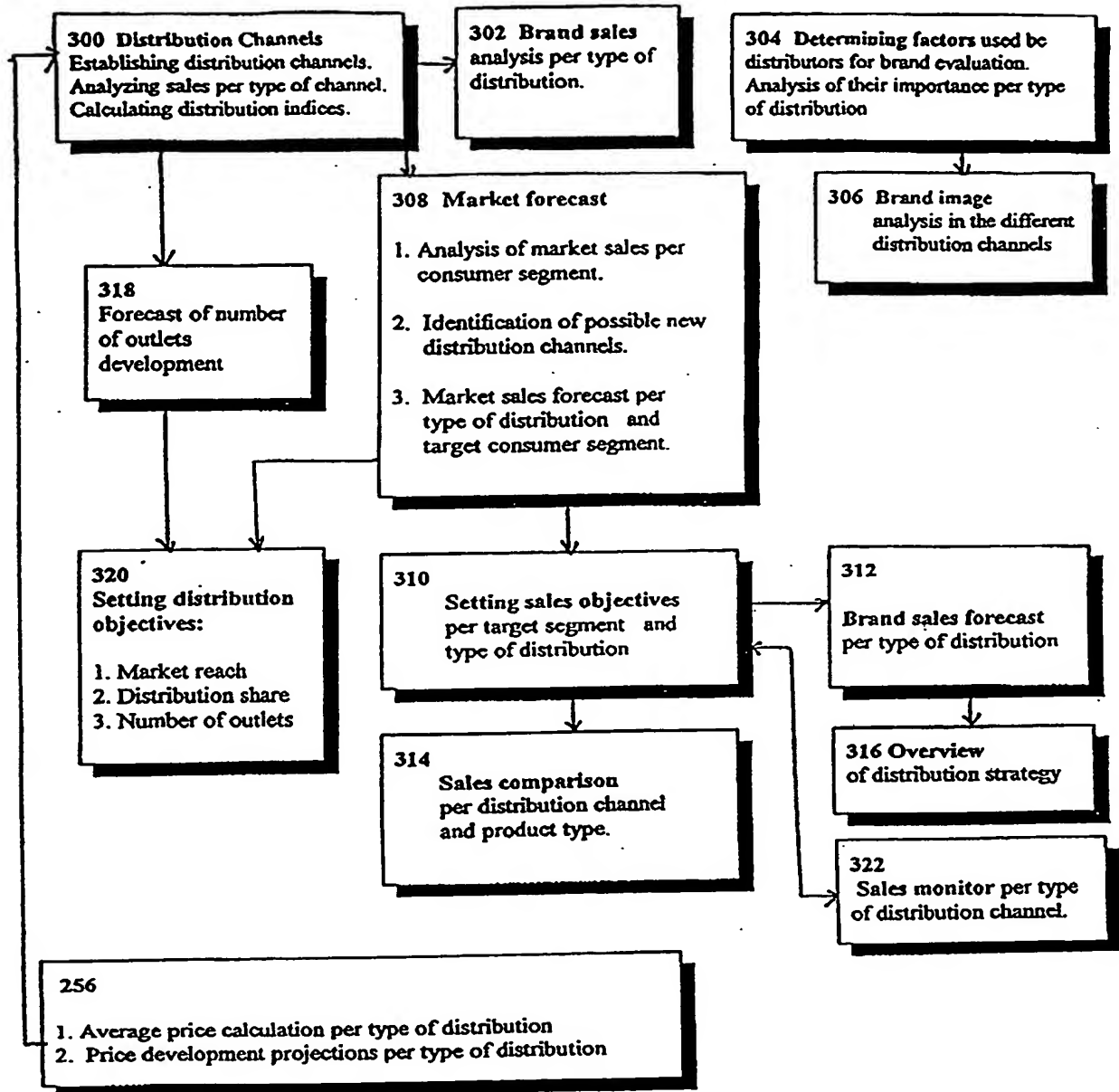


Fig. 8

Fig.1 Block 32

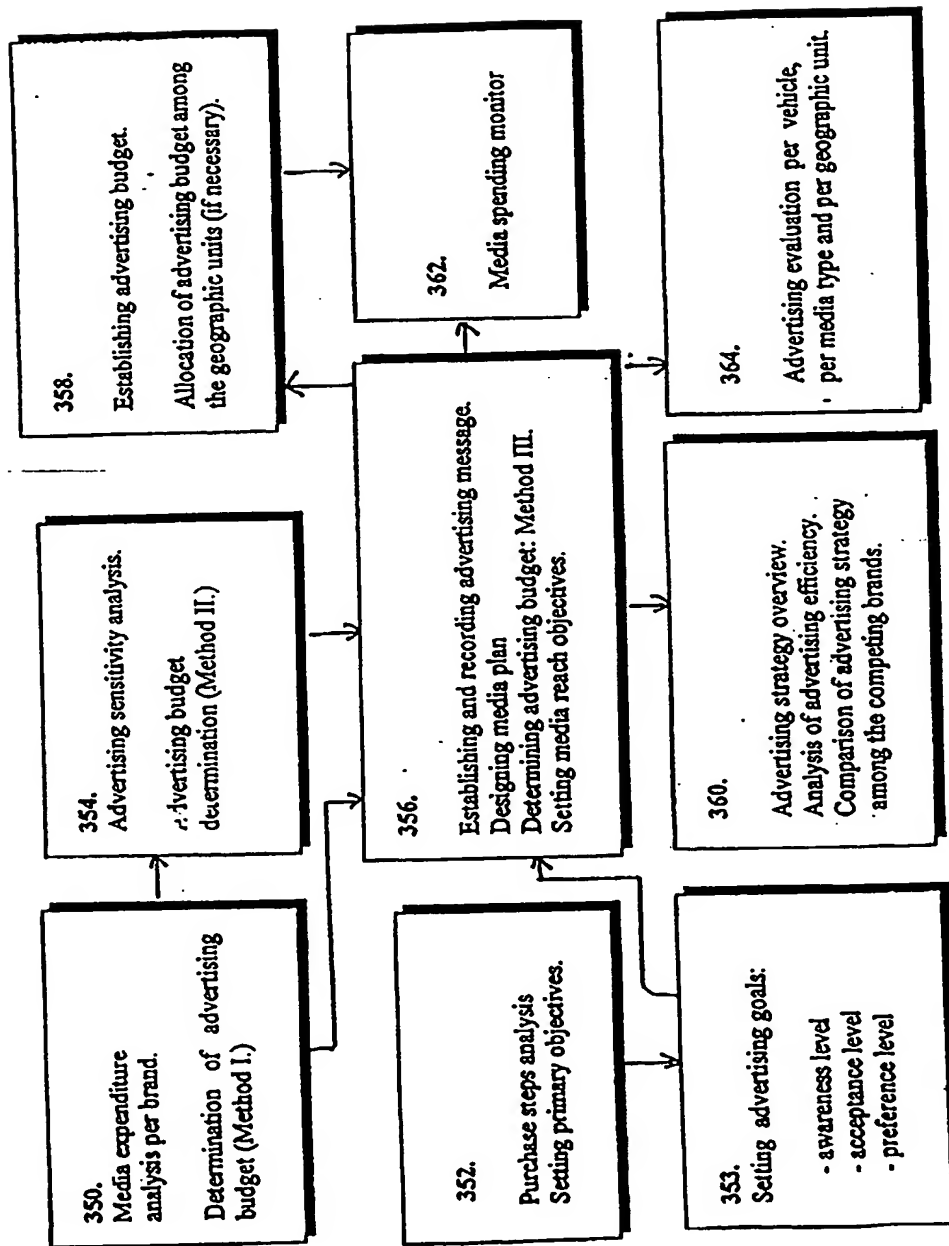


Fig. 9

Fig. 1 Block 34.

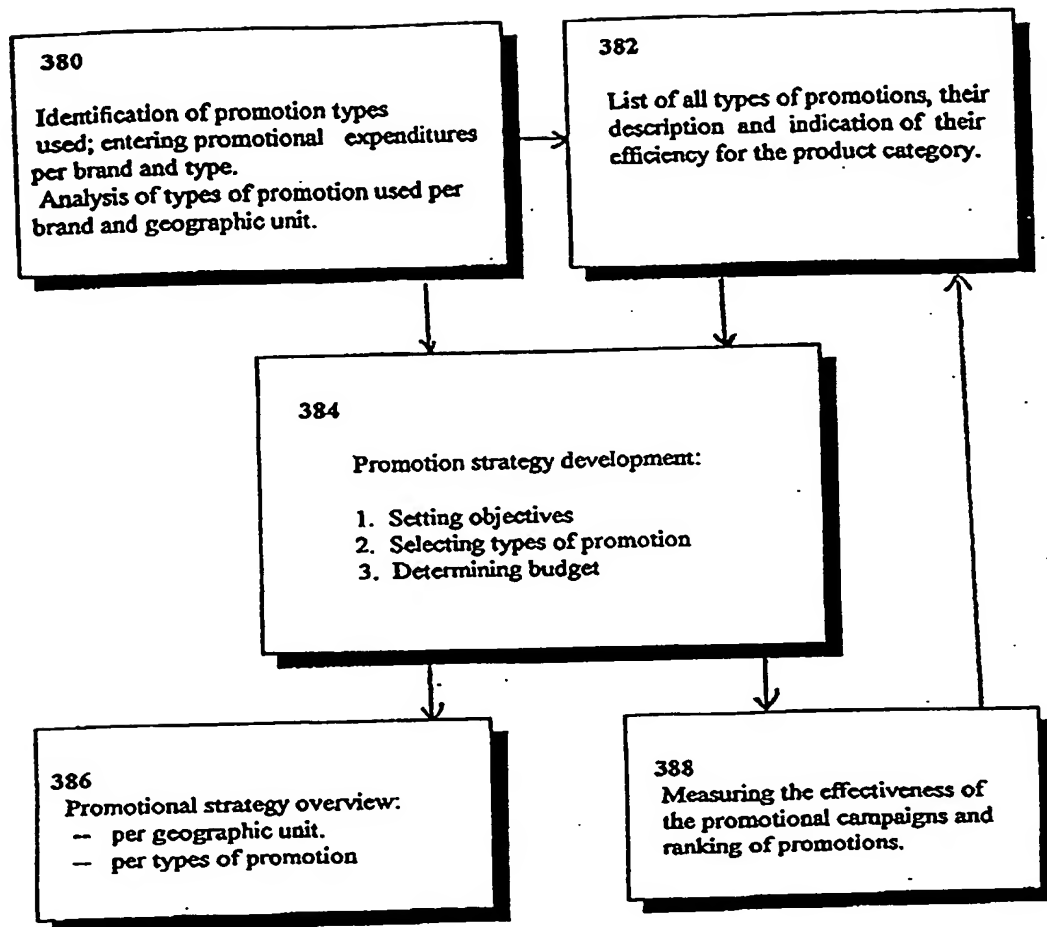


Fig. 10

MARFIN: THE MARKETING CONSULTANT²

400	Explains the marketing task, and how the chart works	402	unit/\$ switch	404	Information needed list	406	List of assumptions	408	List of strategic options	410	List of conclusions	412	Forecast I	414	Section flowchart	416	Chart explanation
F1		F2		F3		F4		F5		F6		F7		F8		F9	

420
 Predesigned chart to perform a certain marketing task = the working platform of the planner

422	424	426
Ctrl M, Ctrl Pg up, Ctrl Pg down	Ctrl S	Ctrl G
Brings up a small menu with enables the planner to move around the charts by typing in the chart number.	Brings up the subchart menu belonging to the main chart. The subcharts rearrange the numbers entered in the main chart so as to reveal their marketing meaning.	Brings up the menu of the graphs belonging to the main chart. The graphs show trends and help design strategy.

430 Shift F1 - F10 keys vary with charts. They have two main functions:

- (a) Help change the variables in the main chart, (like F2 changes geographic units), or
- (b) Help customize the chart

F/G. 11

Fig. 12a

MARKET DEVELOPMENT - FORECAST I

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %	Consumer Demand	Growth Rate %
	Col. 1	Col.2	Col. 1	Col.2	Col.3	Col.4	Col.3	Col.4
TOTAL Market								

Fig. 12b

GROWTH RATE COMPARISON

Geographic Units	Year			Year		
	Growth Rate Units %	Growth Rate Dollars %	Difference	Growth Rate Units %	Growth Rate Dollars %	Difference
	Col. 1	Col.2	Col.3			
TOTAL Market						

Fig. 12c

MARKET DEVELOPMENT - FORECAST II

Geog. Unit	(Units)						
	Year	Year	Year	Future Year	Future Year	Future Year	Future Year
Market Development	Col. 1	Col. 2					
Influencing Factors							
Factor I							
Factor II							

Factor III								
------------	--	--	--	--	--	--	--	--

Fig. 12d

NUMBER OF PRODUCT OWNERS AND SATURATION DEGREES

Cons. Seg.

Geog. Units	Year			Year		
	Consumer Base (000)	Product Owners (000)	Saturation Degree %	Consumer Base (000)	Product Owners (000)	Saturation Degree %
	Col1	Col2	Col3			
TOTAL Market						

Fig. 12e

AVERAGE CONSUMPTION

Cons. Seg.

GEOG. UNITS	YEAR			YEAR		
	Consumer (000)	Average Consumption	Sales (000)	Consumer (000)	Average Consumption	Sales (000)
	Col1	Col2	Col3			
TOTAL Market						

Fig. 12f

MARKET PENETRATION FORECAST

(000)

Geog. Units	Year			Year		
	Consumer Base (000)	Products Owned	Penetration Degree %	Consumer Base (000)	Products Owned	Penetration Degree %
	Col1	Col2	Col3			
TOTAL						



Fig. 14i
PRODUCT PROFITABILITY

Geog. Unit

Year

FINANCIAL INDICATORS	Product Type I		Product Type II		Product Type III	
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Expenses						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
BUSINESS INCOME						

w/a = without allocations

Fig. 14j
PROFITABILITY COMPARISON PER CONSUMER SEGMENT

Geog. Unit

Year

FINANCIAL INDICATORS	T o t a l		Segment I		Segment II	
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Expenses						
TOTAL DIRECT EXP.						

BRAND CONTRIBUTION						
BUSINESS INCOME						

w/a = without allocations

Fig. 14k

PROFITABILITY COMPARISON PER DISTRIBUTION CHANNEL

Geog. Unit

Year

FINANCIAL INDICATORS	T o t a l		Channel I		Channel II	
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Expenses						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
BUSINESS INCOME						

w/a = without allocations

Fig. 141
GOALS PER COST ITEM

Geog. Unit		Product Type		(\$000)		
		CURRENT YEAR		YEAR		YEAR
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)
SALES			100		100	
COST OF GOODS	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
REVENUE						
ADJUSTMENTS						
Adjustment I						
Adjustment II						
NET REVENUE						
MARKETING EXPENSE						
Advertising						
Promotion						
Market Research						
Other						
SELLING EXPENSE						
Sales Force						
Administration						
Other						
OTHER DIRECT EXP.						
Expense I						
Expense II						
Expense III						
INDIRECT EXPENSES						
Expense I						
Expense II						
ALLOCATIONS						
Allocation I						
BUSINESS INCOME						
HURDLE RATE						

DIFFERENCE OF LEVELS	1	2	3	4	5	6	7
1.00							
1.25							
1.50							
1.75							
2.00							
2.25							
2.50							
2.75							
3.00							
3.25							
3.50							
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7.50							
7.75							
8.00							
8.25							
8.50							
8.75							
9.00							
9.25							
9.50							
9.75							
10.00							

Fig.14 m
GROWTH RATE PER COST/REVENUE ITEM

Geog. Unit	Product Type:		(\$000)	
GROWTH RATE %		% of SALES		
		Current year	YEAR	Difference
Col.1	SALES Col.2	Col.3	Col.4	Col.5
	REVENUE ITEMS			
	1.			
	2.			
	3.			
	4.			
	AVE. GROWTH RATE %			
	COST ITEMS			
	1.			
	2.			
	3.			
	4.			
	5.			
	AVE. GROWTH RATE %.			

Fig. 14n
GOALS PER KEY FINANCIAL INDICATOR

Geog. Unit		Product Type:				
FINANCIAL INDICATORS	CURRENT YEAR		YEAR		YEAR	
	\$ (000)	Growth Rate %	\$ (000)	Growth Rate %	\$ (000)	Growth Rate %
SALES Col.1	Col.2	Col.3	Col.4	Col.5		
Cost of Goods						
REVENUE						
Revenue Adjustments						
NET REVENUE						
Marketing Expense						
Selling Expense						
Other Direct Exp.						
TOTAL DIRECT EXP.						
BRAND CONTRIBUTION						
Indirect Expenses						
TOTAL EXPENSES Without Allocations						
PROFIT/LOSS						
Allocations						
TOTAL EXPENSES						
BUSINESS INCOME						

Fig. 14o
GROWTH RATE ANALYSIS: Geographic units

Financial Indicator:					Product Type:			
Geog. Units	Current year		year		year		- year	
	\$ (000)	Growth %	\$ (000)	Growth %	\$ (000)	Growth %	\$ (000)	Growth %
Col1	Col2	Col3	Col4	Col5				
Total								

Fig. 14p

PROFIT AND LOSS STATEMENT

Geog. Unit			Product Type:				
FINANCIAL INDICATORS		CURRENT YEAR		YEAR		YEAR	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100		100		100
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5		
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Exp.							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
Indirect Expense							
TOTAL EXPENSES Without Allocations							
Business Income b/Allocations							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							
% Change in R.O.S.							
% Change in Sales							
% Change in Br. Contr.							
% Change in B. Income C.							

b/allocations.= before allocations

Br. Contr. = Brand Contribution

R.O.S = Return on Sales = (Business Income / Sales)*100

Fig. 14r
SUMMARY OF FINANCIAL STRATEGY

Geog. Unit

FINANCIAL INDICATORS	CURRENT YEAR		NEO PAST YEAR		EXCHANGE RATE GROWTH RATE		
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales	% of Sales
SALES		100		100		100	
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Exp.							
TOTAL DIRECT EXP							
BRAND CONTRIBUTION							
Indirect Expense							
TOTAL EXPENSES Without Allocations							
BI before Allocations							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							

Fig. 14s
FINANCIAL MONITOR

Geog. Unit	YEAR/Period	Product Type:				Distr. Channel:				(\$000)
Financial Indicators	Year-to-Date	Plan	Actual	Difference		Period:				
					%	1st	Actual	Difference		
								\$	%	2nd
SALES	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
Cost of Goods										
REVENUE										
Revenue Adjustments										
NET REVENUE										
Marketing Expense										
Selling Expense										
Other Direct Expenses										
Total Direct Exp.										
BRAND CONTRIBUTION										
BUSINESS INCOME										

Fig. 14v
MONITOR PER GEOGRAPHIC UNIT

Year/Period:	Financial Indicator:		Product Type:		Distr.Channel:		(\$000)	
Geographic Units	Year-to-Date:				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			#	%			#	%
Geog. Unit I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Geog. Unit II								
Geog. Unit III								
Geog. Unit IV								
TOTAL								

Fig.15a

MARKET ENVIRONMENT ANALYSIS

Geog. Unit		Year				
SUBMARKETS	Consumer Base		Market		Market/Consumer r \$	SELECTION
	# (000)	%	\$ (000)	%		
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
2.						
3.						
4.						
5.						
BASE						

X = The same product category Y = new product category Z = Competitive threat

Fig. 15b

RANKING OF SUBMARKETS

Geog. Unit		Year	
NUMBER OF CONSUMERS		MARKET SIZE	
SUBMARKETS	# 000	SUBMARKETS	\$(000)
1. Col.1	Col.2	1. Col.3	Col.4
2.		2.	
3.		3.	
4.		4.	
5.		5.	

SUBMARKET/CONSUMER	
SUBMARKETS	%
1. Col.5	Col.6
2.	
3.	
4.	
5.	

Also in units.

Fig.15c

DEVELOPMENT OF

Geog. Unit

Submarkets	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
Col.1	Col.2	Col.3						
TOTAL								

Fig. 15d

..... PER GEOGRAPHIC UNIT

Submarket

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
Col.1	Col.2	Col.3						
TOTAL								

Fig. 15e

PRODUCT ANALYSIS

Geog. Unit		Year	Cons. Segment		Scale: 5-1			
			The Product	Alternative Product I	Alternative Product II	Better	Y/N	Rank
1. Consumer Need	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	
1.1 Attribute								
1.2 Attribute								
2. Consumer Need								
2.1 Attribute								
2.2 Attribute								
No. of Consumers (000)								
Market Size (000)								

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no market opportunity = there is a market opportunity if there is no alt.
Product with a valuation of (5)

Fig. 15f.

RANKING OF PRODUCTS

Geog. Unit			Year			Cons. Segment			Scale: 1-5		
Product Attribute (1)			Product Attribute (2)			Product Attribute (3)					
Products	Y/N	Score	Products	Y/N	Score	Products	Y/N	Score			
1. Col.1	Col.2	Col.3	1.			1.					
2.			2.			2.					
3.			3.			3.					
4.			4.			4.					

Fig. 15g

RANKING OF PRODUCT ATTRIBUTES

Geog. Unit			Year			Cons. Segment			Scale: 1-5		
The Product			Alternate Product I			Alternate Product II					
Attributes	Y/N	Score	Attributes	Y/N	Score	Attributes	Y/N	Score			
1. Col.1	Col.2	Col.3	1.			1.					
2.			2.			2.					
3.			3.			3.					
4.			4.			4.					

Fig. 15h

COMPETITIVE ANALYSIS

Geog. Unit		Year		Cons. Segment		Scale: 5-1		
Product Attributes		Alternate Products	The Brand	Brand I	Better	Y/N	Rank	Competitive Advantage
Attribute (1)	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
Attribute (2)								
Attribute (3)								
Attribute (4)								
Market Shares (%)								

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no market opportunity = there is a market opportunity if there is no alt.

Product with a valuation of (5)

Fig. 15i

RANKING OF BRANDS

Geog. Unit			Year			Cons. Segment			Scale: 1-5		
Product Attribute (1)			Product Attribute (2)			Product Attribute (3)					
Brands	Y/N	Score	Brands	Y/N	Score	Brands	Y/N	Score			
1. Col.1	Col.2	Col.3	1.			1.					
2.			2.			2.					
3.			3.			3.					
4.			4.			4.					

Fig. 15j

RANKING OF PRODUCT ATTRIBUTES								
Geog. Unit			Year			Cons. Segment		
The Brand			Brand I			Brand II		
Attributes	Y/N	Score	Attributes	Y/N	Score	Attributes	Y/N	Score
1. Col1	Col2	Col3	1.			1.		
2.			2.			2.		
3.			3.			3.		
4.			4.			4.		

Fig.k

CONSUMER PREFERENCE ANALYSIS								
Geog. Unit			Year				Scale:1-5	
	Consumer Base		Segment I		Segment II		Segment III	
	(000)	%	(000)	%	(000)	%	(000)	%
Size of Segment Col.1	Col.2	100 Co. 3	Col.4	100 Col.5		100		100
Current Consumers								
Potential Consumers								
Product Attributes								
Price								
Target Segments								

Scale: (5) = very important (1)= not important at all

Fig.15 l

RANKING OF CONSUMER PREFERENCE

Geog. Unit		Year		Scale: 1-5	
Consumer Base	Score	Segment II	Score	Segment III	Score
1. Attribute		1.		1.	
2. Col.1	Col.2	2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	

Fig. 15m

PRODUCT POSITIONING OVERVIEW

GEOGRAPHIC UNIT:

YEAR:

Brand Positioning

Segment Positioning

Combined

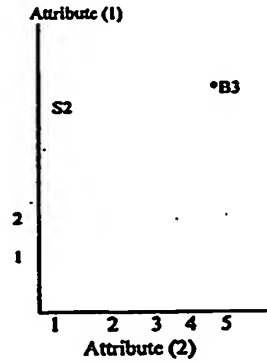
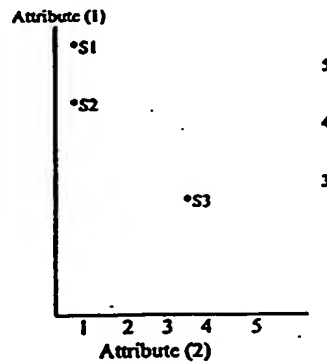
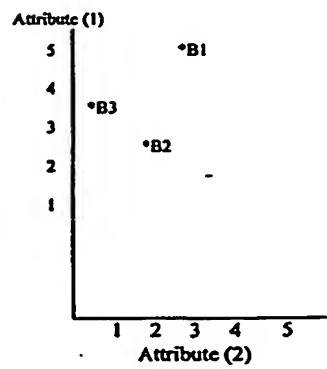


Fig. 15n

PRODUCT FEATURES ANALYSIS

Geog. Unit	Year	Consumer Segment		Scale: 1-5		
PRODUCT ATTRIBUTES/ FEATURES	Alternative Products	BRAND EVALUATION		Conclusions		
		The Brand	Brand I	Brands	Score	Y/N
1. ATTRIBUTE (1) Col1	Col2	Col3	Col4	Col5	Col6	Col7
1.1 Feature						
1.2 Feature						
2. ATTRIBUTE (2)						
2.1 Feature						
2.2 Feature						
3. ATTRIBUTE (3)						
3.1 Feature						
3.2 Feature						
Number of Products						

Scale = 5 excellent 4-3-2 = acceptable 1 = not acceptable

Y/N = yes/no marketing opportunity = there is a marketing opportunity, if no brand (or alternative product) received (5) valuation.

Fig. 15o

IMPORTANCE OF PRODUCT FEATURES

Geog. Unit	Year	Scale: 1-5			
CONSUMER BASE	RATING *	SEGMENT I	RANK	SEGMENT II	RANK
1. Col1	Col2	1. Col3	Col4	1.	
2.		2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	
6.		6.		6.	
7.		7.		7.	

* The highest rating the feature received.

Fig. 15p
PRODUCT FEATURES ANALYSIS PER BRAND

Geog. Unit	car	Brand	Consumer Segment	Scale: 1-5	
PRODUCT FEATURES NEEDED IN ORDER TO BE					
1. Equal to: Brand			2. Superior to: Brand		
Product Features	Rating	Rating Needed	Product Features	Rating	Rating Needed
1. Col1	Col2	Col3	1. Col4	Col5	Col6
2.			2.		
3.			3.		
4.			4.		
5.			5.		
6.			6.		
Number of Products:			Number of Products:		

Fig. 15r

COMPETITIVE EVALUATION

Geog. Unit	Year	Brand	Consumer Segment	Scale: 1-5	
STRATEGY: Equal (Superior)			Target Rating	COMPETITIVE ADVANTAGE	
Product Features	Rating	Rating Needed			
1. Col1	Col2	Col3	Col4	Col5	
2.					
3.					
4.					
5.					
6.					
Number of Products:					

Fig. 15s

PRODUCT LINE DEVELOPMENT

Geog. Unit		Year		Scale: 1-5	
TOTAL MARKET		PRODUCT I			
Product Features	Rating	Price	Consumer Segment	Final Product Specification	Rating
1. Col1	Col2	Col3	Col4	Col5	Col6
2.					
3.					
4.					
5.					
6.					
7.					
8.					
Target Price \$					

Fig. 15t

FINAL PRODUCT SPECIFICATIONS

Geog. Unit		Year		Number of Products:	
— PRODUCT I —		— PRODUCT II —		— PRODUCT III —	
Product Features	Rating	Product Features	Rating	Product Features	Rating
1. Col1	Col2	1.		1.	
2.		2.		2.	
3.		3.		3.	
4.		4.		4.	
5.		5.		5.	
6.		6.		6.	
7.		7.		7.	
8.		8.		8.	
Segment / Price					

Fig. 15u

PRODUCT TYPE INTRODUCTIONS

Geographic Units	Year			Year		
	Product I	Product II	Product III	Product I	Product II	Product III
Col.1	Col.2	Col.3	Col.4			
TOTAL						
Target Price						
Introduction Date						

Fig. 15v

COMPETITIVE PRODUCT OVERVIEW					
GEOG. UNIT		YEAR	PRODUCT TYPE		
PRODUCT/ BRAND	TARGET SEGMENT	CONSUMER NEED / POSITIONING	PRODUCT FEATURE	REASON	ADVERTISING MESSAGE
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6

Fig. 15w

PACKAGING/SERVICE STRATEGIES		
GEOG. UNIT	YEAR	PRODUCT I
I. PACKAGING STRATEGY 1		
1. CONCEPT: 2		
2. SIZE: 3		
3. SHAPE: 4		
4. MATERIAL: 5		
5. COLOR: 6		
6. DESIGN/TEXT: 7		
7. BRAND MARK: 8		
8. LABELING: 9		
II. CUSTOMER SERVICE STRATEGY 10		

Fig. 15x

SALES PER PRODUCT TYPE AND FORECAST

BRAND GEOGRAPHIC UNITS	YEAR						(UNITS 00)*		
	BRAND TOTAL			PRODUCT I			PRODUCT II		
	#	%	Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	100 Col.4	Col.5	Col.6	Col.7			
			100						
			100						
REMAINDER			100						
TOTAL		100	100		100			100	
MARKET Share									
PRICE \$									

*Also in dollars

Fig. 15y

BRAND SHARES PER PRODUCT TYPE

PRODUCT Geographic Units	YEAR						UNITS (00)*			
	Our brand		Brand I		Brand II		Remainder		Total Market	
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	100 Col.11
										100
										100
										100
Remainder										100
TOTAL										100

Fig. 15z

SALES OBJECTIVE DEVELOPMENT PER PRODUCT TYPE

GEOG. UNIT	YEAR		BRAND			(UNITS 00)		
PRODUCTS	TOTAL MARKET		— BRAND SALES —					
	#	%	PRICE I	PRICE II	PRICE III	TOTAL #	%	Share %
PRODUCT I Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col 8	Col9
PRODUCT II								
PRODUCT III								
TOTAL		100					100	
BRAND SHARES PER PRICE LEVEL								

*Also in dollars

Fig. 15 aa

SALES COMPARISON PER CONSUMER SEGMENT AND PRODUCT TYPE

BRAND	YEAR		(UNITS 00)*					
GEOGRAPHIC UNITS	PRODUCT I		SEGMENT I		PRODUCT II		SEGMENT II	
	#	Share%	#	Share%	#	%	#	Share%
Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col8	Col9
REMAINDER								
TOTAL								
MARKET SHARE								
PRICE								

* Also in dollars

Fig. 16a
PRICE SEGMENTATION PER PRICE LEVEL

Geog. Unit	Year			Consumer Segment			(Units)		
PRICE LEVEL	M A R K E T			B R A N D			R E M A I N D E R		
	#	%	Share %	#	%	Share %	#	%	Share %
Price Level I Col.1	Col.2	Col.3	100 Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
Average Prices									
Price Level I			100						
Average Prices									
Price Level I			100						
Average Prices									
T O T A L		100	100		100			100	
Average Prices									

Also in dollars

Fig. 16b
RANKING OF BRANDS PER PRICE LEVEL

Geog. Unit	Year		Consumer Segment		(Units)	
MARKET	PRICE LEVEL I		PRICE LEVEL II		PRICE LEVEL III	
1. Brand (%)	1.	(%)	1.	(%)	1.	(%)
2. Col.1 Col.2	2. Col.3	Col.4	2.		2.	
3.	3.		3.		3.	
4.	4.		4.		4.	
5.	5.		5.		5.	
6.	6.		6.		6.	

Also in dollars

Fig. 16c
SALES OBJECTIVES PER PRICE LEVEL

Brand	Brand			Year			(Units)		
GEOGRAPHIC UNITS	TOTAL MARKET			PRICE LEVEL I			PRICE LEVEL II		
	#	%	Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7			
			100						
			100						
			100						
			100						
			100						
TOTAL MARKET		100	100		100			100	
Brand Share %									
Average Price									

* Also in dollars

Fig. 16d
PRICE SEGMENTATION PER PRODUCT

Geog. Unit	Year	Consumer Segment			(Units)
PRODUCT FEATURES	PRICE LEVEL I				
	MARKET	THE BRAND	BRAND 1	NEW OFFER	
1. Col.1	Col.2	Col.3	Col.4	Col.5	
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
TARGET PRICE					

Fig. 16e
PRICE ELASTICITY ANALYSIS

Geog. Unit	Year	Consumer Segment				(Unit)
	(1)	(2)	(3)	(4)	(5)	(6)
(P) Price	1					
(D) Demand	2					
ELASTICITY	3					

Fig. 16f
PRICE SEGMENTATION PER CONSUMER SEGMENT

Geog. Unit	Year	Consumer Segment								(Units)
PRICE LEVEL	M A R K E T			SEGMENT I			SEGMENT II			
	#	%	Share %	#	%	Share %	#	%	Share %	
Price Level I Col.1	Col.2	Col.3	100 col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	
Average Price \$										
Price Level I			100							
Average Price \$										
Price Level I			100							
Average Price \$										
T O T A L		100	100		100			100		
Average Price \$										
Segment Size (000)										
Target Price \$										

Also in dollars

Fig. 16g

PRICE SEGMENTATION PER DISTRIBUTION CHANNEL

Geog. Unit	Year			Consumer Segment			(Units)		
PRICE LEVEL	M A R K E T			CHANNEL I			CHANNEL II		
	#	%	Share %	#	%	Share %	#	%	Share %
Price Level I Col1	Col2	Col3	100 Col4	Col5	Col6	Col7	Col8	Col9	Col10
Average Price \$									
Price Level I			100						
Average Price \$									
Price Level I			100						
Average Price \$									
T O T A L		100	100		100			100	
Average Price \$									

Also in dollars

Fig. 17a

MARKET ANALYSIS PER TYPE OF DISTRIBUTION

Geog. Unit		Year				Brand				(000)							
Distribution Channels	ALL DISTRIBUTORS	Outlets (000)	Sales		Average Sales	THE BRAND'S DISTRIBUTORS				BRAND							
			#	%		Older		Adaptive		Similar		#	%	Brand Share %	Dist. Share %		
						Col.1	Col.2	Col.3	Col.4	Col.5	Col.6					Col.7	Col.8
TYPE I	Col.1	Col.3	Col.3	Col.4	Col.5	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.11	Col.12	Col.13	Col.14
TYPE II																	
TYPE III																	
TYPE IV																	
TYPE V																	
TYPE VI																	
TYPE VII																	
TYPE VIII																	
TYPE IX																	
REMAINDER																	
TOTAL					100				100						100		

• Also in Dollars

• Also in Dollars

Fig. 17b

IMPORTANCE OF TYPES OF DISTRIBUTION

Geog. Unit		Year			(000)
TOTAL MARKET	THE BRAND'S DISTRIBUTORS	BRAND SALES	MARKET REACH	DISTRIBUTOR SHARE	
1. Type of Distribution	Type of Distribution (1)	Type of Distribution (1)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars (1) Ranking number of the distribution channel in the total market

Fig. 17c

FIRST STRATEGY INDICATIONS

Geog. Unit		Year	
NEW DISTRIBUTION CHANNELS		CHANNELS TO IMPROVE SHARE	
	(X)		(Y)
Col.1	Col.2	Col.3	Col.4

(X) = Market Reach

(Y) = Distribution share

Fig. 17d

BRAND SHARES PER TYPE OF DISTRIBUTION									
Geog. Unit	Year						(Units)		
Distribution Channels	Total Market			The Brand			Brand I		
	#		Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
TOTAL		100			100			100	

Fig. 17 e

RANKING OF TYPES OF DISTRIBUTION PER BRAND

Geog. Unit	Year				(000)
TOTAL MARKET	THE BRAND	BRAND I	BRAND II	BRAND III	
1. Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17f

RANKING OF BRANDS PER TYPE OF DISTRIBUTION

Geog. Unit	Year				(000)
TOTAL MARKET	TYPE I	TYPE II	TYPE III	TYPE IV	
1. Brand (%)	Brand (%)	Brand (%)	Brand (%)	Brand (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17 g

DETERMINING FACTORS USED BY DISTRIBUTORS FOR BRAND EVALUATION

Geog. Unit	Year				Score: low-high
Distribution Channel	FACTOR I	FACTOR II	FACTOR III	FACTOR IV	FACTOR V
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TYPE II					
TYPE III					
TYPE IV					
TYPE V					
REMAINDER					

Fig. 17 h

RANKING OF DETERMINING FACTORS

Geog. Unit	Year			Score: low-high
TYPE I	TYPE II	TYPE III	TYPE IV	
1. Factor	1. Factor	1. Factor	1. Factor	
2. Col.1	2. Col.2	2. Col.3	2. Col.4	
3.	3.	3.	3.	
4.	4.	4.	4.	

Fig. 17 i

OVERVIEW OF DETERMINING FACTORS

Distr. Channel	Year				Score: low-high
Geographic Unit	FACTOR I	FACTOR II	FACTOR III	FACTOR IV	FACTOR V
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL					

Fig. 17j

BRAND IMAGE IN THE DISTRIBUTION CHANNELS

Geog. Unit	Year		Distr. Type		Score: low-high
FACTORS	THE BRAND	BRAND I	BRAND II	BRAND III	Strong / Weak
1. Factor Col.1	Col.2	Col.3	Col.4	Col.5	Col.6 (x)
2. Factor					
3. Factor					
4. Factor					

Fig. 17k

RANKING OF BRANDS

Geog. Unit	Year	Distribution Type			Score: low-high
FACTOR II	FACTOR III	FACTOR III	FACTOR IV	FACTOR IV	FACTOR VI
1. Brand (x)	1.	1.	1.	1.	1.
2. Col.1	2. Col.2	2. Col.3	2. Col.4	2. Col.5	2. Col.6
3.	3.	3.	3.	3.	3.
4.	4.	4.	4.	4.	4.

Fig. 17l

STRENGTH AND WEAKNESS ANALYSIS

Geog. Unit	Year	Brand		Score: low-high
Distribution Channels	FACTOR I	FACTOR II	FACTOR III	FACTOR IV
TYPE I	Strong / Weak (x)			
TYPE II Col.1	Col.2	Col.3	Col.4	Col.5
TYPE III				
TYPE IV				
TYPE V				
REMAINDER				

Fig. 17m
OVERVIEW OF BRAND IMAGE IN THE DISTRIBUTION CHANNELS

Distr. Channel	Year		Factor		Score: low-high
Geographic Units	THE BRAND	BRAND I	BRAND II	BRAND III	Strong / Weak
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6 (x)
T O T A L					

Fig. 17n
BRAND SHARES PER TYPE OF DISTRIBUTION

Geographic Unit	Year						(Units)		
Distribution Channels	TOTAL MARKET			Segment I			Segment II		
	#	%	Share %	#	%	Share %	#	%	Share %
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
TYPE II			100						
TYPE III			100						
TYPE IV			100						
TYPE V			100						
NEW TYPE A			100						
NEW TYPE B			100						
TOTAL		100	100		100			100	

Fig. 17

RANKING OF TYPES OF DISTRIBUTION PER CONSUMER SEGMENT

Geog. Unit	Year				(000)
TOTAL MARKET	SEGMENT I	SEGMENT II	SEGMENT III	SEGMENT IV	
1. Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	Type of Distribution (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17p

RANKING OF CONSUMER SEGMENTS PER TYPE OF DISTRIBUTION

Geog. Unit	Year				(000)
TOTAL MARKET	TYPE I	TYPE II	TYPE III	TYPE IV	
1. Segment (%)	Segment (%)	Segment (%)	Segment (%)	Segment (%)	
2. Col.1	Col.2	Col.3	Col.4	Col.5	
3.					
4.					
5.					
6.					

Also in Dollars

Fig. 17r

OVERVIEW OF DISTRIBUTION SEGMENTATION

Geog. Unit.	Year						(Unit(s))		
Distribution Channels	TOTAL MARKET			SEGMENT I			SEGMENT II		
	#		Share %	#	%	Share %	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
			100						
			100						
TOTAL		100	100		100			100	

Fig. 17s
SALES OBJECTIVES PER CONSUMER SEGMENT AND TYPE OF DISTRIBUTION

Geog. Unit	Year		Brand			(Units)*			
DISTRIBUTION CHANNELS	— T O T A L —					— SEGMENT I —			
	TOTAL MARKET		THE BRAND			TOTAL MARKET		THE BRAND	
	#	%	#	Share %	#	%	#	Share %	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE I									
TYPE II									
TYPE III									
NEW TYPE A									
NEW TYPE B									
REMAINDER									
TOTAL		100					100		

*Also in dollars

Fig. 17 t
COMPARISON OF BRAND SHARES PER CONSUMER SEGMENT

Geog. Unit	Year		Brand						(Units)*
DISTRIBUTION CHANNELS	TOTAL MARKET		SEGMENT I		SEGMENT II		SEGMENT III		
	Share %		Share %	Difference %	Share %	Difference %	Share %	Difference %	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	
TYPE I									
TYPE II									
TYPE III									
NEW TYPE A									
NEW TYPE B									
REMAINDER									
TOTAL									

* Also in dollars

Fig. 17u.
COMPARISON OF DISTRIBUTION AND PRODUCT STRATEGIES

Geog. Unit			Year		Brand			(Units)		
Distribution Channels		Total Market		Brand Sales						
		#	%	PRODUCT I	PRODUCT II	PRODUCT III	Total	%	Share %	
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TYPE II										
TYPE III										
TYPE A										
TYPE B										
REMAINDER										
TOTAL			100					100		

* Also in dollars

Fig. 17x
OVERVIEW OF PRODUCT STRATEGY PER TYPE OF DISTRIBUTION

Distribution Channel			Year		Brand			(Units)	
Geographic Units	TOTAL MARKET		BRAND SALES						
	#	%	PRODUCT I	PRODUCT II	PRODUCT III	TOTAL	%	Share %	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TOTAL		100					100		

* Also in dollars

Fig. 17y

DISTRIBUTION STRATEGY OVERVIEW

Geog. Unit		Brand				(Units)			
Distribution Channels		Y e a r				Y e a r			
		Market	Brand Sales			Market	Brand Sales		
		#	#	%	Share %	#	#	%	Share %
TYPE I	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE II									
TYPE III									
TYPE A									
TYPE B									
REMAINDER									
TOTAL				100				100	

* Also in dollars

Fig. 17z

OVERVIEW OF SALES OBJECTIVES

Distr. Channel		Brand				(Units)			
Geographic Units		Y e a r				Y e a r			
		Market	Brand Sales			Market	Brand sales		
		#	#	%	Share %	#	#	%	Share %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TOTAL				100				100	

* Also in dollars

Fig. 17aa

NUMBER OF OUTLETS DEVELOPMENT FORECAST

Geog. Unit

Distribution Channels	Year		Year		Year	
	Outlet #	Growth %	Outlet #	Growth %	Outlet #	Growth %
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TYPE II						
TYPE III						
NEW TYPE A						
NEW TYPE B						
REMAINDER						
TOTAL						

*Also in dollars

Fig. 17bb

OVERVIEW OF NUMBER OF OUTLETS DEVELOPMENT

Distr. Channel

Geographic Units	Year		Year		Year	
	Outlet #	Growth %	Outlet #	Growth %	Outlet #	Growth %
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TOTAL						

*Also in dollars

Fig. 17cc

DEVELOPMENT OF DISTRIBUTION OBJECTIVES

Geog. Unit			YEAR		BRAND		(UNITS)		
DISTRIBUTION CHANNELS	TOTAL MARKET		MARKET REACH		DISTRIBUTION SHARE		BRAND SALES		
	#	%	Current %	YEAR %	Current %	YEAR	#	%	Share %
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
TYPE II									
TYPE III									
TYPE A									
TYPE B									
REMAINDER									
TOTAL		100						100	

* Also in dollars

Fig. 17dd

NUMBER OF OUTLETS OBJECTIVES

Geog. Unit		Brand				(Units 00)		
DISTRIBUTION CHANNELS	Total Market		Current Distributors		Outlets Needed		Difference	
	Outlets #	Average Sales	Outlets #	Average Sales	Outlets	Average Sales	Outlets	Average Sales
TYPE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TYPE II								
TYPE III								
TYPE A								
TYPE B								
REMAINDER								
TOTAL								

* Also in Dollars

Fig. 18a
MEDIA EXPENDITURE ANALYSIS

Geog. Unit	Year						(S000)	
Media	Total Market		The Brand		Brand II		Brand III	
	\$	%	\$	%	\$	%	\$	%
Medium I	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Medium II								
Medium III								
Medium IV								
New Medium								
Total Spending		100%		100%		100%		100%
S.O.V.	100 %							
Brand Share								

S. O. V. = Share of voice

Fig. 18b

RANKING OF BRANDS ACCORDING TO MEDIA EXPENDITURE

Geog. Unit	Year				(000)
Brands	Media Expenditure (\$)		Share of Voice (%)		Rank
	Col.2	Col.3	Col.4	Col.5	Col.6
1. Col.1					
2.					
3.					
4.					
5.					

S.O.V. = Share of voice

Fig. 18c
RANKING OF BRANDS MEDIUM

Geog. Unit	Year						(000)	
MEDIUM I	MEDIUM II		MEDIUM III		MEDIUM IV			
Brands	\$	%	Brands	\$	%	Brands	\$	%
1. Col.1	Col.2	Col.3	1.	Col.4	Col.5	1.	Col.6	Col.7
2.			2.			2.		
3.			3.			3.		
4.			4.			4.		
5.			5.			5.		

.S. .V.= Share of voice

Fig. 18d
OVERVIEW OF MEDIA EXPENDITURE

Medium	Year				(5000)			
Geographic Unit	Total Value		De Brand		Brand 1		Brand 2	
	\$	%	\$	%	\$	%	\$	%
Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col8	Col9
TOTAL		100		100		100		100
Share of Voice %	100%							

Fig. 18e
PURCHASE STEP ANALYSIS
Consumer Segment

Year	Consumer Segment							
	Awareness		Acceptance		Preference		Purchase Intent	
	Brand 1	Brand 2	Brand 1	Brand 2	Brand 1	Brand 2	Brand 1	Brand 2
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL								
INDEX								

Base: Consumer Base

Index base = Awareness level

Base: Consumer Base

Index base = Awareness level

Fig. 18f
BRAND RANK ANALYSIS
Consumer Segment

Year	Consumer Segment												
	Geographic Unit	Brand Share		Share of Voice		Awareness		Acceptance		Preference		Purchase Intent	
		%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11	Col.12	Col.13	
TOTAL													

Fig. 18g

SETTING ADVERTISING GOALS

Geog. Unit	Consumer Segment							
	Awareness Level %	Awareness Level %	Awareness Index	Preference Level %	Preference Index	Purchase Level %	Purchase Index	Brand Share %
Current Year Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Year (1)								
Year (2)								
Year (3)								
End of Planning Period								

Base = Consumer Base

Index Base = Awareness Level

Fig. 18h

OVERVIEW OF ADVERTISING GOALS

Year	Brand						(Units)
	Geographic Unit	Consumer Base (000)	Awareness Level %	Acceptance Level %	Preference Level %	Purchase Level %	Ratio of Purchase
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL							

Base = Consumer Base

Fig. 18i

ADVERTISING SENSITIVITY ANALYSIS								
Geog. Unit	Brand	(Units)						
	Year	Year	Year	Future Year	Future Year	Future Year	Future Year	Future Year
Media Budget	1							
Brand Sales	2							
Awareness %	3							
Acceptance %	4							
Preference %	5							
Purchase Level %	6							
Market Share %	7							
Total Media Spending \$	8							
Factor (x)	9							

Fig. 18j

MEDIA PLAN DEVELOPMENT		
GEOG. UNIT:	YEAR	CAMPAIGN: 1
MEDIUM: Magazine	Good Housekeeping	Consumers #:
TIMING	May. 1 - June 15	
CONSUMER SEGMENT	Women 25-40	600,000
ADVERTISING GOALS:		
Media reach (GRP's)	1 34%	204,000
Number of contacts	2 16	172,000
Media Index	3 4	
Insertions needed	4 15	
PLACEMENT COSTS:	5 U.S. \$ 15,000	
CAMPAIGN EXPENSE:	6 U.S. \$ 225,000	
AWARENESS LEVEL:	7 40%	81,600
PURCHASE LEVEL:	8 8%	6,528
FREQUENCY OF PURCHASE:	9 Sales potential (in units): 6,528	

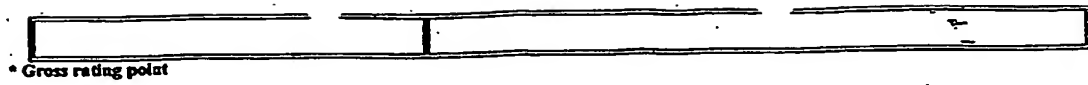


Fig. 18k

MEDIA PLAN					YEAR		
GEOG. UNIT MEDIA	CONSUMER COVERAGE		AWARENESS LEVEL		POT. SALES (\$)	ADV. BUDGET (\$)	SALES/ \$
	(000)	(\$/1000)	%	(00)	(000)	(000)	(000)
VEHICLE I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
VEHICLE II							
VEHICLE III							
VEHICLE IV							
TOTAL							
DUPLICATIONS %:		SALES OBJ. (#000) 9				AWARENESS: % 11	
		Difference (#000): 10				Difference: % 12	

Fig. 18l

MEDIA PLAN SUMMARY					YEAR		
GEOG. UNIT MEDIA	CONSUMER COVERAGE		AWARENESS LEVEL		POT. SALES (\$)	ADV. BUDGET (\$)	SALES/ \$
	(000)	(\$/1000)	%	(00)	(000)	(000)	(000)
MEDIUM I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
MEDIUM II							
MEDIUM III							
MEDIUM IV							
MEDIUM V							
MEDIUM VI							
TOTAL							

Fig. 18m

ADVERTISING BUDGET

(\$000)

Geographic Unit	Sales %	Advertising Budget - current year			Advertising Budget - 1 year			
		MEDIA	Other	TOTAL	MEDIA	Other	TOTAL	%
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Higher-level TOTAL	100%							100%

Fig. 18n

ADVERTISING BUDGET OVERVIEW

(\$000)

Media	Year		Year		Year		Year	
	\$	Growth Rate %	\$	Growth Rate %	\$	Growth Rate %	\$	Growth Rate %
MEDIUM I Col.1	Col.2	Col.3						
MEDIUM II								
MEDIUM III								
TOTAL								

Fig. 18o

ADVERTISING STRATEGY OVERVIEW

(Units)

Geographic Unit	Sales %	Brand Share %	Advertising Budget (\$000)	Sales (\$10,000)	Objectives
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6

Fig. 12g

NUMBER OF UNITS OWNED

Year (000)

Geographic Units	Product Owners (000)	Number of Owners With			Average units owned	Total units owned
		One unit	Two units	Three units		
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL Market						

Fig. 12h

NET SCRAPPAGE CALCULATION

Year (000)

Geographic Units	Number of Units Scrapped (000)	Units Replaced		Net Scrappage #
	Col.1	Col.2	Col.3	Col.4
TOTAL Market				

Fig. 12i

REPLACEMENT PURCHASES

(Units)

Geog. Units	Year		Year		Year		Year	
	#	%	#	%	#	%	#	%
	Col.1	Col.2						
TOTAL Market								

Fig. 12j
Market F recast III - Consumer Durables
Option:1 / 2

Year		(Units)				
Geog.Units	Initial Purchases		Additional Purchases		Replacement Purchases	
	#	%	#	%	#	%
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL Market						

Fig. 12k**ADDITIONAL PURCHASES DEVELOPMENT**

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %	#	Growth Rate %
	Col.1	Col.2			Col.5	Col.6		
TOTAL Market								

Fig. 12l**FINAL MARKET FORECAST**

Geog. Units	Current Market		Future Year		
	Forecast I	Forecast II	Forecast III	Final Forecast	
	Col.1	Col.2	Col.3	Col.4	Col.5
TOTAL Market					

Fig. 12m

MARKET DEVELOPMENT SUMMARY

Geographic Units	Mty	Market EOP		Growth Rate %	\$Market Rank	Current Market		Planned Rank
		%	%			%	%	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL Market			100				100	

Mty= Market Maturity Indication Introduction / Growth / Maturity / Decline
 EOP= End of Planning period defined by user
 \$Sales Rank= Rank of Geographic unit in the dollar sales market.

Fig. 12n

STRATEGY SUMMARY

Geographic Units	Mty	Current Brand Share		Strategy indications			
		%	Rank	Share Growth	Maintain	Harvest	Terminate
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
TOTAL Market							

Fig. 12o

MARKET MONITOR								
YEAR: period			Cons. Seg.				(Units)	
Geog. Units	Month		Month		Month		Quarter Total	
	#	%	#	%	#	%	#	%
Geog. I	Col.1	Col.2						
Plan	A.							
Actual	B.							
Difference	C.							
Geog. II								
Plan								
Actual								
Difference								
TOTAL								
Plan								
Actual								
Difference								

Also in Dollar

Fig. 12p

Y-T-D MONITOR

YEAR: Period		Cons. Seg.				(Units)		
Geog. Units	Year-to-Date				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			#	%			#	%
	Col.1	Col.2	Col.3	Col.4				
TOTAL Market								

Also in Dollars

Fig. 12r

MARKET BREAKDOWN ACCORDING TO CONSUMER SEGMENT

Geographic Units	Past Year				Future Year			
	Segment Size		Market Size		Segment Size		Market Size	
	#	%	#	%	#	%	#	%
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
TOTAL		100		100		100		100

Fig. 12s

INITIAL SELECTION OF TARGET CONSUMER SEGMENT

(Units)

Subsegments	Current Year			End of Planning Period			Primary Selection
	Sales #	Share %	\$Sales Rank	Sales #	Share %	\$Sales Rank	
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8
2.							
3.							
4.							
5.							

Fig. 12t

MARKET OVERVIEW PER CONSUMER SEGMENT

Geog. Unit:

(Units)

Subsegments	Past Year		Past Year		Future Year		Future Year	
	Sales #	Growth %	Sales #	Growth %	Sales #	Growth %	Sales #	Growth %
1. Col.1	Col.2	Col.3			Col.4	Col.5		
2.								
3.								
4.								
5.								

Fig. 12u

MARKET OVERVIEW PER SEGMENT AND GEOGRAPHIC UNIT

Subsegment

Geographic Units	Past Year		Past Year		Future Year		Future Year	
	Sales	Growth %	Sales	Growth %	Sales	Growth %	Sales	Growth %
	Col.1	Col.2			Col.3	Col.4		
TOTAL								

Fig. 13a

BRAND SHARE DEVELOPMENT - FORECAST I

Geographic Units	The Brand		Brand I		Brand II		Remainder		Total Market	
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
	Col. 1	Col.2	Col. 3	Col.4	Col. 5	Col.6	Col.7	Col.8	Col.9	Col.10
										100
										100
TOTAL										100

Fig. 13b

BRAND SHARES COMPARISON

Geographic Units	Year			Year		
	Sales share %	\$Sales Share %	Difference %	Sales share %	\$Sales Share %	Difference %
	Col.1	Col. 2	Col.3			
TOTAL						

Fig. 13c

GROWTH RATES COMPARISON

Geographic Units	Brand Sales			Market	Brand	Difference %
	Growth Rate %	\$Growth Rate %	Difference %	Growth Rate %	Growth Rate %	
	Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6
TOTAL						

Fig. 13d

WINNING AND LOSING BRANDS

Geog. Unit

Brands gaining share:				Brands losing share			
Current Year		End of Planning Period		Current Year		End of Planning Period	
Brands	Gain	Brands	Gain	Brands	Loss	Brands	Loss
Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8

Fig. 13e

STRONG AND WEAK GEOGRAPHIC UNITS

Brand

Strong Geographic Units				Weak Geographic Units			
Current Year		End of Planning Period		Current Year		End of Planning Period	
Geog. Units	Share%	Geog. Units	Share%	Geog. Units	Share %	Geog. Units	Share %
Col. 1	Col. 2	Col. 3	Col. 4	Col. 5	Col. 6	Col. 7	Col. 8
Average Share			Average Share				

Fig. 13f
AVERAGE CONSUMPTION
Brand

Cons. Seg.		Year			Year			(Units)
Geographic Units		Consumers (000)	Average Consumption	Sales	Consumers (000)	Average Consumption	Sales	
		Col. 1	Col. 2	Col.3				
TOTAL								

Fig. 13g
CONSUMPTION SHARE ANALYSIS

Geog. Unit		Consumer Segment						(Units)		
Col. 1	Year					Year				
	Consumers		Average	Sales		Consumers		Average	Sales	
	(000)	%	Consumption	#	%	(000)	%	Consumption	#	%
The BRAND	Col. 2	Col. 3	Col. 4	Col. 5	Col.6					
BRAND I										
BRAND II										
TOTAL		100			100		100			100

Fig13h
CONSUMPTION PER CONSUMER SEGMENT
Brand

GEOG. UNIT			Brand							
Col. 1	Year					Year				
	Consumers		Average	Sales		Consumers		Average	Sales	
	(000)	%	Consumption	(000)	%	(000)	%	Consumption	(000)	%
Segment I	Col.2	Col. 3	Col. 4	Col. 5	Col.6					
Segment II										
Segment III										
TOTAL		100			100		100			100

Fig. 13i

MARKET SHARE OBJECTIVES DEVELOPMENT

Brand		Year								(Units)
Geog. Units	Strategy	Total Market		Current Year				Planning Year		
		Sales	Brand Sales		%	Share %	Brand Sales	%	Share %	
1. Col. 1	Col. 2	Col. 3	Col.4	Col. 5	Col.6	Col.7	Col. 8	Col. 9	Col.10	
2.										
3.										
TOTAL			100		100			100		

Fig. 13j

ANALYSIS OF BRAND'S POSITION

ANALYSIS OF BRAND POSITION					Year					(Units)
Brand		Action Needed:								
Strong Position										
Geographic Units	Rank	Share %	Competing		Geographic Units	Rank	Share %	Competing		
			Brand	Share %				Brand	Share%	
Col. 1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col. 9	Col.10	

Rank: according to market size

Fig. 13 k

SALES AND MARKET SHARE DEVELOPMENT

Brand		Future Year				Future year				(Units)
Geographic Units		Sales	Change %	Share %	Change %	Sales	Change %	Share %	Change %	
		Col. 1	Col.2	Col.3	Col.4					
TOTAL										

Fig. 13l

MARKET AND BAND SALES FORECAST

Brand				(Units)		
Geographic Units	Future Year			Future Year		
	Market Sales	Brand Sales	Brand Share	Market Sales	Brand Sales	Brand Share
	Col.1	Col.2	Col.3			
TOTAL						

Fig. 13 m

SUMMARY OF BRAND SALES AND SHARE OBJECTIVES

Brand				Consumer Segment						(Units)
Geographic Units	Current year			End of Planning Period						
	Market Sales	Brand		Market		Brand				
		Sales	Share %	Sales	Change %	Sales	Change %	Share	Change %	
	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	
TOTAL										

Fig. 13n

RANKING OF GEOGRAPHIC UNITS ACCORDING TO SALES

Brand				Consumer Segment				(Units)
Major Sales Growth				Major Sales Loss				
Geographic Units	Current Sales	EOP Sales	Difference	Geographic Units	Current Sales	EOP Sales	Difference	
1. Col. 1	Col.2	Col.3	Col.4					
2.								
3.								
4.								

EOP = End of Planning Period

Fig. 13o
RANKING OF GEOGRAPHIC UNITS ACCORDING TO BRAND SHARE

Brand				Consumer Segment				(Units)
Major Share Growth				Major Share Loss				
Geographic Units	Current Share %	EOP Share %	Difference	Geographic Units	Current Share %	EOP Share %	Difference	
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	
2.								
3.								
4.								

EOP = End of Planning Period

Fig. 13p

COMPARISON OF MARKET AND BRAND SALES GROWTH

Brand		Consumer Segment				(Units)	
Geographic Units	Market Sales		Brand Sales		Difference	Brand Rank	
	Growth	Change %	Growth	Change %			
1.							
2.							
3.							
TOTAL							

Fig. 13r

STRENGTH AND WEAKNESS ANALYSIS

	STRENGTH	Rank	WEAKNESS	Rank
1. Geographic Units	Col. 1	Col. 2	Col.3	Col.4
Average market share				
2. Consumer Segments				
3. Product Features				
# of Products				
4. PRICE				
Average Price \$				
5. ADVERTISING				
MEDIA				
ADV. BUDGET				
S.O.V.				
6. BRAND IMAGE				
Awareness:				
Acceptance:				
Preference:				
Market Share				
7. PROMOTION				
8. DISTRIBUTION				
Distribution Image				
9. OBSERVATIONS				

Fig. 13s

BRAND SALES MONITOR								
Year: period		Brand:			Product Type:			(Units)
Geog. Units	_____ T o t a l _____							
	Market Sales				Brand Sales			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
Col1	Col2	Col3	Col4	Col5	Col6	Col7	Col8	Col9
TOTAL								

Also in Dollar

Fig.13t

COMPETITIVE SALES MONITOR

Geographic Unit: _____

Year: period _____

Product Type _____

(Units)

Brands	_____ T o t a l _____							
	Brand Sales				Brand Shares			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
The Brand Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Brand I								
Brand II								
TOTAL								

Also in Dollar

Fig.13u

SALES MONITOR PER CONSUMER SEGMENT								
Geographic Unit:		Brand			Year: period			(Units)
Consumer Segments	_____ T o t a l _____							
	Brand Sales				Brand Shares			
	Plan	Actual	Difference	Dif. %	Plan	Actual	Difference	Dif. %
	Segment I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8

Segment II								
TOTAL								

Also in Dollar

Fig.13v

Y-T-D MONITOR

Brand	Year: Period				Consumer Segment	Product Type	(Units)	
Geog. Units	Year-to-Date				Period:			
	Plan	Actual	Difference		Plan	Actual	Difference	
			QTD	%			QTD	%
TOTAL								

Also in Dollars

Fig. 13w

BRAND SALES AND OBJECTIVES PER CONSUMER SEGMENT

Geog. Unit		Year								(Units)	
Consumer Segment: Age		The Brand		Brand I		Brand II		Remainder		Total Market	
		#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
13 to 25	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11
26 to 50											100
50 plus											100
TOTAL											100

Also in Dollars

Fig.13x

INITIAL SELECTION OF TARGET CONSUMER SEGMENT									
Geog. Unit			Brand				(Units)		
Subsegments	Current Year			End of Planning Period			Major Competitor	Selection	
	Sales #	Share %	Rank	Sales #	Share %	Rank		Pre	Tgt
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10
2.									
10.									

Also in Dollars

Rank = ranking number according to market size

Pre= Preselection (step 66)

Tgt = target selection

Fig. 13y

Segment		Year								(Units)	
Geographic Units	The Brand		Brand I		Brand II		Remainder		Total Market		
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11	
											100
											100
TOTAL											100

Also in Dollars

Fig. 13z

Geog. Unit		Year								(Units)	
Consumer Segments	The Brand		Brand I		Brand II		Remainder		Total Market		
	#	Share %	#	Share %	#	Share %	#	Share %	#	Share %	
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11	
2.											100
											100
											100
10.											100

Also in Dollars

Fig. 13aa

SUMMARY OF SALES OBJECTIVES PER TARGET SEGMENT

Brand		Year			(Units)	
Geographic Unit		Total Market			Segment I	
		Market Sales	Brand Sales	Brand Share %	Market Sales	Brand Sales
Col.1		Col.2	Col.3	Col.4	Col.5	Col.6
TOTAL						

Also in Dollars

Fig. 13bb

BRAND OWNERSHIP CONSUMER DURABLE GOODS

Geog. Unit.		Year								(Units)	
Consumer Segment: Age		The Brand		Brand I		Brand II		Remainder		Total Market	
		#	Share %	#	Share %	#	Share %	#	Share %	#	Share %
13 to 25	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9	Col.10	Col.11
26 to 50											100
50 plus											100
TOTAL											100

Fig.13cc

BRAND OWNERSHIP SHARE VS. MARKET SHARE ANALYSIS

Geog. Unit		Year		Consumer Segment		(Units)	
Brands		Brand Sales		Brand Share %		Ownership Share %	
1.	Col.1	Col.2		Col.3		Col.4	Col.5
2.							
3.							

Fig. 13dd

OVERVIEW OF BRAND OWNERSHIP PER GEOGRAPHIC UNIT

Brand		Consumer Segment				(Units)		
Geographic Units	Year				Year			
	Ownership		Brand Share %	Difference %	Ownership		Brand Share %	Difference %
	#	Share %			#	Share %		
Col.1	Col.2	Col.3	Col.4	Col.5				
TOTAL								

Fig. 14a.
KEY FINANCIAL INDICATORS ANALYSIS

Geog. Unit		Year					
FINANCIAL INDICATORS	PRODUCT TYPE		UNIT I		UNIT II		
	\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales	
SALES		100		100		100	
Cost of Goods Co.1	Col.2	Col.3	Col.4	Col.5	Co.6	Co.7	
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
Indirect Expenses							
TOTAL EXPENSES w/a							
BUSINESS INCOME w/a							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							

w/a = without allocations

	YEAR			YEAR		
	PROD. TYPE	UNIT I	UNIT II	PROD. TYPE	UNIT I	UNIT II
DISCOUNT	col.1	Co.2	Col.3			

Fig. 14b
COMPARISON OF KEY FINANCIAL INDICATORS

Geog. Unit:		YEAR		(\$000)		
PRODUCT		COMPARED TO				
	BETTER	PRODUCT	COMPARED TO:	WORSE	PRODUCT	COMPARED TO:
SALES	Col1	Col2	Col3	Col4	Col5	Col6
REVENUE INDICATORS	1.			1.		
	2.			2.		
	3.			3.		
	4.			4.		
	5.			5.		
COST INDICATORS	1.			1.		
	2.			2.		
	3.			3.		
	5.			4.		
	5.			5.		
	6.			6.		

Fig. 14c

KEY FINANCIAL INDICATORS PER BRAND

Geog. Unit		Year					
FINANCIAL INDICATORS		PRODUCT TYPE		BRAND I		BRAND II	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100 %		100 %		100 %
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
Indirect Expenses							
TOTAL EXPENSES w/a							
BUSINESS INCOME w/a							
Allocations							
TOTAL EXPENSES							
BUSINESS INCOME							

w/a = without allocations

Fig. 14d

Geog. Unit		COST ITEM ANALYSIS				Year		(\$000)	
		PRODUCT TYPE		UNIT I		UNIT II			
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales		
SALES			100 %		100 %				
COST OF GOODS	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7		
REVENUE									
ADJUSTMENTS									
Adjustment I									
Adjustment II									
NET REVENUE									
MARKETING EXP.									
Advertising									
Promotion									
Market Research									
Other									
SELLING EXPENSE									
Sales Force									
Administration									
Other									
OTHER DIRECT EXP.									
Expense I									
Expense II									
Expense III									
INDIRECT EXPENSES									
Expense I									
Expense II									
ALLOCATIONS									
Allocation I									
BUSINESS INCOME									
HURDLE RATE									

DIFFERENCE						

Fig. 14e

COST ITEM ANALYSIS PER PRODUCT TYPE

Geog. Unit		Year		(\$000)			
		PRODUCT		TYPE I		TYPE II	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100 %		100 %		100 %
COST OF GOODS	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
ADJUSTMENTS							
Adjustment I							
Adjustment II							
NET REVENUE							
MARKETING EXP.							
Advertising							
Promotion							
Market Research							
Other							
SELLING EXPENSE							
Sales Force							
Administration							
Other							
OTHER DIRECT EXP.							
Expense I							
Expense II							
Expense III							
INDIRECT EXPENSES							
Expense I							
Expense II							

ALLOCATIONS						
Allocation I						
BUSINESS INCOME						
HURDLE RATE						
DIFFERENCE						

Fig. 14f

BREAK-EVEN ANALYSIS

Geog. Unit	Year	
	The Product	Comparison
	\$ (000)	\$ (000)
RETAIL PRICE Col.1	Col.2	Col.3
MARKETING EXPENSE		
SELLING EXPENSE		
OTHER DIRECT EXPENSE		
INDIRECT EXPENSE		
ALLOCATIONS		
TOTAL FIXED COSTS		
VARIABLE COSTS (per unit)		
QUANTITY INCREMENT		
DISCOUNT RATE %		

UNITS SOLD (000)	PROFIT/LOSS %	PROFIT/LOSS %
Col.1	Col.2	Col.3

These two charts are next to one another on the screen.

Fig. 14g
P & L ANALYSIS AT DIFFERENT SALES LEVELS

Geog. Unit	Year		Product Type				UNIT	
FINANCIAL INDICATORS	ACTUAL DATA		VERSION I		VERSION II		VERSION III	
	\$ (000)	% Sales	\$ (000)	% Sales	\$ (000)	% Sales	\$ (000)	% Sales
SALES		100		100		100		100
Cost of Goods Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.8
NET BUSINESS INCOME								
Marketing expense								
Selling expense								
Other direct expenses								
DIRECT EXPENSE								
BRAND CONTRIBUTION								
Indirect expense								
INCOME w/a								
Allocations								
TOTAL EXPENSE								
BUSINESS INCOME								
DIFFERENCE In:								
SALES %								
BRAND CONTRIBUTIONS %								
INCOME %								
SALES INCREASE : %						DISCOUNT %:		

Fig. 14h
MARKET PROFITABILITY COMPARISON

Consumer Segment:		Year				Product type:	
FINANCIAL INDICATORS		Geog. Unit I		Geog. Unit II		Geog. Unit III	
		\$ (000)	% of Sales	\$ (000)	% of Sales	\$ (000)	% of Sales
SALES			100		100		100
Cost of Goods	Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7
REVENUE							
Revenue Adjustments							
NET REVENUE							
Marketing Expense							
Selling Expense							
Other Direct Expenses							
TOTAL DIRECT EXP.							
BRAND CONTRIBUTION							
BUSINESS INCOME							

w/a = without allocations

Highest Level		100%			
TOTAL					

Fig. 18p

RANKING OF ADVERTISING EFFICIENCY

Geographic Units	Sales / \$10,000	Brand Share %	Major Media
1. Col.1	Col.2	Col.3	Col.4
2.			
3.			
4.			
5.			
6.			
7.			

Fig. 18r

ADVERTISING STRATEGY COMPARISON

Geog. Unit	Year				(Units)
Brands	Sales (000)	Brand Share %	Advertising Budget (\$'000)	Sales/ \$10,000	Major Media
The Brand Col. 1	Col.2	Col.3	Col.4	Col. 5	Col.6
Brand I					
Brand II					
TOTAL					

Fig. 18s

ADVERTISING SPENDING MONITOR								
Geog. Unit	Year/Period		Brand			(Units)		
	MARKET				Brand			
	Plan	Actual	Diff.		Plan	Actual	Diff.	
			Planned	Actual			Planned	Actual
MEDIUM I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
MEDIUM II								
MEDIUM III								
TOTAL								

Fig.18t
CAMPAIGN EVALUATION

Geog. Unit	Year		Consumer Segment		Brand			
	Awareness		Acceptance		Preference		Purchase	
	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
Vehicle I Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Vehicle II								
Vehicle III								
Vehicle IV								
TOTAL								

Base: Consumer Base

Fig.18u
YEARLY OVERVIEW

Geog. Unit	Year		Consumer Segment		Brand		Medium	
	Year		Year		Year		Year	
	Plan	Actual	Plan	Actual	Plan	Actual	Plan	Actual
SALES (\$000) Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
SALES (\$000)								
Awareness								
Acceptance %								
Preference %								

Purchase level								
----------------	--	--	--	--	--	--	--	--

Base: Consumer Base

Fig. 19a

PROMOTIONAL EXPENDITURE ANALYSIS

Geog. Unit	Year		(S000)					
Type of Promotion	Total Marketing		S.O.P. Brand		Brand I		Remainder	
	S	%	S	%	S	%	S	%
Promotion I	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
Promotion II								
Promotion III								
Promotion IV								
Non-Promotion								
Total Spending				100		100		100
S.O.P. %	100 %							
% of Media Spending								
Media Spending S								

S. O. P. = Share of promotion

Fig. 19b

RANKING OF BRANDS ACCORDING TO MEDIA EXPENDITURE

Geog. Unit	Year		(000)	
Brands	Promotional Expenditure S	Share of Promotion %	Brand Share %	Rank
1. Col.1	Col.2	Col.3	Col.4	Col.5
2.				
3.				
4.				
5.				

S.O.V. = Share of promotion

Fig. 19c

RANKING OF BRANDS PER TYPE OF PROMOTION

Geog. Unit	Year		(000)			
PROMOTION I	PROMOTION II		PROMOTION III		PROMOTION IV	
	Brands	SOP %	Brands	SOP %	Brands	SOP %
1. Col.1	Col.2	1.		1.		1.
2.		2.		2.		2.
3.		3.		3.		3.
4.		4.		4.		4.

S.		S.		S.		S.	
----	--	----	--	----	--	----	--

S.O.P.= Share of promotion

Fig. 19d

RANKING PROMOTION TYPES PER BRAND

Geog. Unit		Year						(000)
The Brand		Brand I		Brand II		Brand III		
Promotion type	SOP %	Promotion type	SOP %	Promotion type	SOP %	Promotion type	SOP %	
1. Col.1	Col.2	1.		1.		1.		
2.		2.		2.		2.		
3.		3.		3.		3.		
4.		4.		4.		4.		
5.		5.		5.		5.		

S.O.P. = Share of promotion

Fig. c

OVERVIEW OF PROMOTIONAL EXPENDITURE

Type of Promotion		Year						(\$000)
Geographic Unit		Total Market		The Brand		Brand II		Remainder
		S	C	S	C	S	C	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL		100		100		100		100
Share of Promotion %		100						

Fig. 19f

PROMOTION INVENTORY				
Geographic unit		Year		
Types of Promotion	Description/ Objective	Effectiveness Ratio %	Cost Efficiency	Brands Using
Col.1	Col.2	Col.3	Col.4	Col.5

Fig. 19g

PROMOTIONAL STRATEGY DEVELOPMENT			
Geographic unit		Year	
CAMPAIGNS	I	II	III
OBJECTIVE	1		
TARGET	2		
TYPE OF PROMOTION	3		
SIZE	4		
BUDGET	5		
TIMING	6		
RATIONALE	7		
SALES TARGET	8		
RESULTS	9		
COMMENTS	10		

Fig. 19j

Geog. Unit		PROMOTION STRATEGY OVERVIEW						(UNITS)
		Year						
Types of Promotion	Size of Campaign	Sales Targets			Sales Actual			Budget \$ (000)
		(000)	Response Rate	Unit / \$	(000)	Response Rate	Unit / \$	
Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	Col.7	Col.8	Col.9
TOTAL								

Fig. 19K

Geog. Unit		RANKING OF PROMOTIONS ACCORDING TO COST EFFICIENCY				(Units)
		Year				
Types of Promotion		Size of Campaign	Sales (000)	Effectiveness Ratio	Units Sold / \$ 10,000	Budget \$ (000)
1. Col.1	Col.2	Col.3	Col.4	Col.5	Col.6	
2.						
3.						
4.						
5.						
6.						

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US00/24780

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/60

US CL : 705/1

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. CL : 705/1, 10

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
Derwent, EPO, JPIO

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A, P	US 5,999,908 A (ABELOW, DANIEL) 07 December 1999 (07.12.1999), Column 9, line 15 - Column 14, line 59.	1-5
A, P	US 6,009,407 A (GARG, AMIT) 28 December 1999 (28.12.1999), Column 2, line 38 - Column 4, line 29.	1-5
A	US 6,044,357 A (GARG, AMIT) 28 March 2000 (28.03.2000), Column 3, line 1 - Column 4, line 23.	1-5

☐ Further documents are listed in the continuation of Box C.

☐ See patent family annex.

* Special categories of cited documents:

"A" document defining the general state of the art which is not considered to be of particular relevance

"E" earlier application or patent published on or after the international filing date

"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)

"O" document referring to an oral disclosure, use, exhibition or other means

"P" document published prior to the international filing date but later than the priority date claimed

"T"

later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X"

document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

"Y"

document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

"Δ"

document member of the same patent family

Date of the actual completion of the international search

18 October 2000 (18.10.2000)

Date of mailing of the international search report

21 Nov 2000

Name and mailing address of the ISA/US

Commissioner of Patents and Trademarks
Box PCT
Washington, D.C. 20231

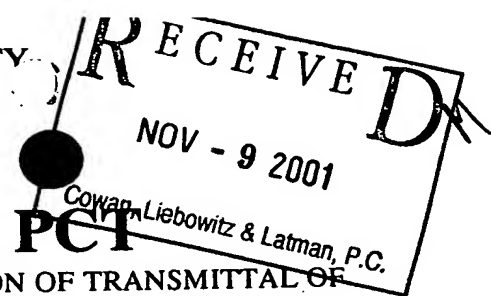
Facsimile No. (703)305-3230

Authorized officer

James Trammel

Telephone No. (703) 305-9700

PATENT COOPERATION TREATY



From the
INTERNATIONAL PRELIMINARY EXAMINING AUTHORITY

T :
R. LEWIS GABLE
COWAN, LIEBOWITZ & LATMAN, P.C.
1133 AVENUE OF THE AMERICAS
35TH FL.
NEW YORK, NY 10036

NOTIFICATION OF TRANSMITTAL OF INTERNATIONAL PRELIMINARY EXAMINATION REPORT

(PCT Rule 71.1)

Date of Mailing
(day/month/year)

05 NOV 2001

Applicant's or agent's file reference

23319.01

IMPORTANT NOTIFICATION

International application No.

PCT/US00/24780

International filing date (day/month/year)

08 September 2000 (08.09.2000)

Priority date (day/month/year)

08 September 1999 (08.09.1999)

Applicant

BOSZE, SUZANNE M.

1. The applicant is hereby notified that this International Preliminary Examining Authority transmits herewith the international preliminary examination report and its annexes, if any, established on the international application.
2. A copy of the report and its annexes, if any, is being transmitted to the International Bureau for communication to all the elected Offices.
3. Where required by any of the elected Offices, the International Bureau will prepare an English translation of the report (but not of any annexes) and will transmit such translation to those Offices.
4. **REMINDER**

The applicant must enter the national phase before each elected Office by performing certain acts (filing translations and paying national fees) within 30 months from the priority date (or later in some Offices)(Article 39(1))(see also the reminder sent by the International Bureau with Form PCT/IB/301).

Where a translation of the international application must be furnished to an elected Office, that translation must contain a translation of any annexes to the international preliminary examination report. It is the applicant's responsibility to prepare and furnish such translation directly to each elected Office concerned.

For further details on the applicable time limits and requirements of the elected Offices, see Volume II of the PCT Applicant's Guide.

Name and mailing address of the IPEA/US

Commissioner of Patents and Trademarks
Box PCT
Washington, D.C. 20231

Facsimile No. (703)305-3230

Authorized officer

James Trammell

Telephone No. (703) 305-3900

Peggy Harrod

PATENT COOPERATION TREATY

PCT

INTERNATIONAL PRELIMINARY EXAMINATION REPORT

(PCT Article 36 and Rule 70)

Applicant's or agent's file reference 23319.01	FOR FURTHER ACTION See Notification of Transmittal of International Preliminary Examination Report (Form PCT/IPEA/416)	
International application No. PCT/US00/24780	International filing date (day/month/year) 08 September 2000 (08.09.2000)	Priority date (day/month/year) 08 September 1999 (08.09.1999)
International Patent Classification (IPC) or national classification and IPC IPC(7): G06F 17/60 and US Cl.: 705/1		
Applicant BOSZE, SUZANNE M.		
<p>1. This international preliminary examination report has been prepared by this International Preliminary Examining Authority and is transmitted to the applicant according to Article 36.</p> <p>2. This REPORT consists of a total of <u>3</u> sheets, including this cover sheet.</p> <p><input type="checkbox"/> This report is also accompanied by ANNEXES, i.e., sheets of the description, claims and/or drawings which have been amended and are the basis for this report and/or sheets containing rectifications made before this Authority (see Rule 70.16 and Section 607 of the Administrative Instructions under the PCT).</p> <p>These annexes consist of a total of <u>0</u> sheets.</p>		
<p>3. This report contains indications relating to the following items:</p> <p>I <input checked="" type="checkbox"/> Basis of the report</p> <p>II <input type="checkbox"/> Priority</p> <p>III <input type="checkbox"/> Non-establishment of report with regard to novelty, inventive step and industrial applicability</p> <p>IV <input type="checkbox"/> Lack of unity of invention</p> <p>V <input checked="" type="checkbox"/> Reasoned statement under Article 35(2) with regard to novelty, inventive step or industrial applicability; citations and explanations supporting such statement</p> <p>VI <input type="checkbox"/> Certain documents cited</p> <p>VII <input type="checkbox"/> Certain defects in the international application</p> <p>VIII <input type="checkbox"/> Certain observations on the international application</p>		
Date of submission of the demand 09 April 2001 (09.04.2001)	Date of completion of this report 08 October 2001 (08.10.2001)	
Name and mailing address of the IPEA/US Commissioner of Patents and Trademarks Box PCT Washington, D.C. 20231 Facsimile No. (703)305-3230	Authorized officer James Trammell <i>Peggy Hamed</i> Telephone No. (703) 305-3900	

Form PCT/IPEA/409 (cover sheet)(July 1998)

INTERNATIONAL PRELIMINARY EXAMINATION REPORT

International Application No.

PCT/US00/2...80

I. Basis of the report

1. With regard to the elements of the international application:*

☒ the international application as originally filed.

☒ the description:

pages 1-52 as originally filed

pages NONE, filed with the demand

pages NONE, filed with the letter of _____.

☒ the claims:

pages 53 as originally filed

pages NONE, as amended (together with any statement) under Article 19

pages NONE, filed with the demand

pages NONE, filed with the letter of _____.

☒ the drawings:

pages 1-97 as originally filed

pages NONE, filed with the demand

pages NONE, filed with the letter of _____.

☒ the sequence listing part of the description:

pages NONE as originally filed

pages NONE, filed with the demand

pages NONE, filed with the letter of _____.

2. With regard to the language, all the elements marked above were available or furnished to this Authority in the language in which the international application was filed, unless otherwise indicated under this item.

These elements were available or furnished to this Authority in the following language _____ which is:

☐ the language of a translation furnished for the purposes of international search (under Rule 23.1(b)).

☐ the language of publication of the international application (under Rule 48.3(b)).

☐ the language of the translation furnished for the purposes of international preliminary examination (under Rules 55.2 and/or 55.3).

3. With regard to any nucleotide and/or amino acid sequence disclosed in the international application, the international preliminary examination was carried out on the basis of the sequence listing:

☐ contained in the international application in printed form.

☐ filed together with the international application in computer readable form.

☐ furnished subsequently to this Authority in written form.

☐ furnished subsequently to this Authority in computer readable form.

☐ The statement that the subsequently furnished written sequence listing does not go beyond the disclosure in the international application as filed has been furnished.

☐ The statement that the information recorded in computer readable form is identical to the written sequence listing has been furnished.

4. ☒ The amendments have resulted in the cancellation of:

☒ the description, pages NONE

☒ the claims, Nos. NONE

☒ the drawings, sheets/fig NONE

5. ☐ This report has been established as if (some of) the amendments had not been made, since they have been considered to go beyond the disclosure as filed, as indicated in the Supplemental Box (Rule 70.2(c)).**

* Replacement sheets which have been furnished to the receiving Office in response to an invitation under Article 14 are referred to in this report as "originally filed" and are not annexed to this report since they do not contain amendments (Rules 70.16 and 70.17).

** Any replacement sheet containing such amendments must be referred to under item 1 and annexed to this report.

V. Reasoned statement under Rule 2(a)(ii) with regard to novelty, inventive step or industrial applicability; citations and explanations supporting such statement**1. STATEMENT**

Novelty (N)	Claims <u>1-5</u>	YES
	Claims <u>NONE</u>	NO
Inventive Step (IS)	Claims <u>1-5</u>	YES
	Claims <u>NONE</u>	NO
Industrial Applicability (IA)	Claims <u>2</u>	YES
	Claims <u>1,3,4,5</u>	NO

2. CITATIONS AND EXPLANATIONS

1. Claims 1,3,4,5 lack industrial applicability as defined novelty under PCT Article 33(4). Claims 1 and 3 merely manipulate data and do not produce any useful, tangible and concrete product and therefore lack industrial activity.

2. Claim 2 meets the criteria set out in PCT Article 33(2)-(4), because the prior art, specifically Garg ('407) in view of Garg ('357) does not teach or fairly suggest if the current profit level is below said profit goals, discontinuing marketing the product.

----- NEW CITATIONS -----

ENT COOPERATION TREATY

From the INTERNATIONAL SEARCHING AUTHORITY

To:
R. LEWIS GABLE
COWAN, LIEBOWITZ & LATMAN, P.C.
1133 AVENUE OF THE AMERICAS
35TH FL.
NEW YORK, NY 10036

PCT

NOTIFICATION OF TRANSMITTAL OF
THE INTERNATIONAL SEARCH REPORT
OR THE DECLARATION

(PCT Rule 44.1)

Applicant's or agent's file reference 23319.01	Date of Mailing (day/month/year) 21 NOV 2000
International application No. PCT/US00/24780	International filing date (day/month/year) 08 SEPTEMBER 2000 (08.09.2000)
Applicant BOSZE, SUZANNE M.	

1. ☒ The applicant is hereby notified that the international search report has been established and is transmitted herewith.
Filing of amendments and statement under Article 19:
 The applicant is entitled, if he so wishes, to amend the claims of the international application (see Rule 46):
Jan. 21, 2001 L.C.
When? The time limit for filing such amendments is normally 2 months from the date of transmittal of the international search report; however, for more details, see the notes on the accompany sheet.
Where? Directly to the International Bureau of WIPO
 34, chemin des Colombettes
 1211 Geneva 20, Switzerland
 Facsimile No.: (41-22) 740.14.35

For more detailed instructions, see the notes on the accompanying sheet.
2. ☐ The applicant is hereby notified that no international search report will be established and that the declaration under Article 17(2)(a) to that effect is transmitted herewith.
3. ☐ With regard to the protest against payment of (an) additional fee(s) under Rule 40.2, the applicant is notified that:
 - ☐ the protest together with the decision thereon has been transmitted to the International Bureau together with the applicant's request to forward the texts of both the protest and the decision thereon to the designated Offices.
 - ☐ no decision has been made yet on the protest; the applicant will be notified as soon as a decision is made.
4. **Further action(s):** The applicant is reminded of the following:

Shortly after 18 months from the priority date, the international application will be published by the International Bureau.
 If the applicant wishes to avoid or postpone publication, a notice of withdrawal of the international application, or of the priority claim, must reach the International Bureau as provided in rules 90 bis 1 and 90 bis 3, respectively, before the completion of the technical preparations for international publication.

Within 19 months from the priority date, a demand for international preliminary examination must be filed if the applicant wishes to postpone the entry into the national phase until 30 months from the priority date (in some Offices even later).

Within 20 months from the priority date, the applicant must perform the prescribed acts for entry into the national phase before all designated Offices which have not been elected in the demand or in a later election within 19 months from the priority date or could not be elected because they are not bound by Chapter II.

Name and mailing address of the ISA/US
 Commissioner of Patents and Trademarks
 Box PCT
 Washington, D.C. 20231
 Facsimile N . (703)305-3230

Authorized officer

James Trammel

Telephone N . (703) 305-9700

Form PCT/ISA/220 (July 1998)

PATENT COOPERATION TREATY

PCT

INTERNATIONAL SEARCH REPORT

(PCT Article 18 and Rules 43 and 44)

Applicant's or agent's file reference 23319.01	FOR FURTHER ACTION	see Notification of Transmittal of International Search Report (Form PCT/ISA/220) as well as, where applicable, item 5 below.
International application No. PCT/US00/24780	International filing date (<i>day/month/year</i>) 08 SEPTEMBER 2000 (08.09.2000)	(Earliest) Priority Date (<i>day/month/year</i>) 08 SEPTEMBER 1999 (08.09.1999)
Applicant SUZANNE M.BOSZE		

This international search report has been prepared by this International Searching Authority and is transmitted to the applicant according to Article 18. A copy is being transmitted to the International Bureau.

This international search report consists of a total of 3 sheets.



It is also accompanied by a copy of each prior art document cited in this report.

1. Basis of the Report

a. With regard to the language, the international search was carried out on the basis of the international application in the language in which it was filed, unless otherwise indicated under this item.



the international search was carried out on the basis of a translation of the international application furnished to this Authority (Rule 23.1(b)).

b. With regard to any nucleotide and/or amino acid sequence disclosed in the international application, the international search was carried out on the basis of the sequence listing:



contained in the international application in written form.



filed together with the international application in computer readable form.



furnished subsequently to this Authority in written form.



furnished subsequently to this Authority in computer readable form.



the statement that the subsequently furnished written sequence listing does not go beyond the disclosure in the international application as filed has been furnished.



the statement that the information recorded in computer readable form is identical to the written sequence listing has been furnished.

2. ☐ Certain claims were found unsearchable (See Box I).

3. ☐ Unity of invention is lacking (See Box II).

4. With regard to the title,



the text is approved as submitted by the applicant.



the text has been established by this Authority to read as follows:

5. With regard to the abstract,



the text is approved as submitted by the applicant.



the text has been established, according to Rule 38.2(b), by this Authority as it appears in Box III. The applicant may, within one month from the date of mailing of this international search report, submit comments to this Authority.

6. The figure of the drawings to be published with the abstract is Figure No. 1



as suggested by the applicant.



None of the figures



because the applicant failed to suggest a figure.



because this figure better characterizes the invention.

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US00/24780

Box III TEXT OF THE ABSTRACT (Continuation of Item 5 of the first sheet)

The technical features mentioned in the abstract do not include a reference sign between parentheses (PCT Rule 8.1(d)).

NEW ABSTRACT

A method is disclosed, see Figure 1, for devising on a computer a marketing plan for a particular product/service provided by a given entity. The method comprises steps of defining one or more variable that are used to carry out the method, creating a series of charts for implementing a processing of analyzing the defined variables, and defining a product name, a time frame over which a process of analysis is carried out; and a geographic unit in which the product is marketed. The process of analysis (14) includes the steps of analyzing the size of the market for the particular product and forecasting the size of the market within the frame, identifying the major brands of the particular product within a given geographic unit and calculating the entire market for the particular product within the given geographic unit, determining the share of the entire market of the particular product marketed by the entity, setting goals as to the profit level of the particular product of the entity and monitoring the current profit level of the particular product with the profit level goals (28).

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US00/24780

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/60
US CL : 705/1

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)
U.S. CL : 705/1, 10

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
Derwent, EPO, JP10

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A, P	US 5,999,908 A (ABELOW, DANIEL) 07 December 1999 (07.12.1999), Column 9, line 15 - Column 14, line 59.	1-5
A, P	US 6,009,407 A (GARG, AMIT) 28 December 1999 (28.12.1999), Column 2, line 38 - Column 4, line 29.	1-5
A	US 6,044,357 A (GARG, AMIT) 28 March 2000 (28.03.2000), Column 3, line 1 - Column 4, line 23.	1-5

☐ Further documents are listed in the continuation of Box C.

☐ See patent family annex.

Special categories of cited documents:

- * "A" document defining the general state of the art which is not considered to be of particular relevance
- * "E" earlier application or patent published on or after the international filing date
- * "L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)
- * "O" document referring to an oral disclosure, use, exhibition or other means
- * "P" document published prior to the international filing date but later than the priority date claimed

* "T"

later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

* "X"

document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

* "Y"

document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art

* "&"

document member of the same patent family

Date of the actual completion of the international search

18 October 2000 (18.10.2000)

Date of mailing of the international search report

21 NOV 2000

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